TEC-1 Form LETTER of Technical Bid

[*Place, date*]

A: [*Contractor’s name and address]*

Sir/Madam:

We, the undersigned, offer to provide consulting services for [*title of consulting services*] in accordance with your Request for Bids (RFB) and our bid.

We hereby present our offer, which is comprised of this technical bid and a price bid, which is submitted on separate stamped paper.

We are presenting our bid in association with: [*Insert a list with the full name and address of each associated consulting firm*][[1]](#footnote-2)

We declare that all the information and affirmations made in this offer are true and that any misinterpretation therein can lead to our disqualification.

We declare that we will maintain our offer for the period and under the conditions stipulated in section 6.1. of the RFB.

If negotiations are carried out during the validity perod of the offer, we agree to negotiate based on the proposed staff. This offer is of an obligatory nature for us and is subject to modifications that may arise from the contract negotiations.

We understand that you are not obligated to accept any of the bids you receive.

We do not have any sanction from the Finance Bank or any other International Financial Institution (IFI).

We agree that within the selection process (and in the case that we are the successful bidders, in the execution) within the contract, we will observe the laws on fraud and corruption, including bribery, as applicable in the client’s country.

Sincerely,

Authorized signature [*complete and initialled*]*:*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signatory’s name and position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of the firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TEC-2 Form Consultant’s experience

[*In the following format, provide information on each of the jobs and each one associated with this job that were legally contracted, as individuals or a legal entity, or as one of the principal firms in a partnership, to provide similar consulting services to those requested in this project. Use a maximum of 20 pages.*]

|  |  |
| --- | --- |
| Name of the job: | Approximate value of the job (in United States dollars) |
| Country:  Location within the country: | Duration of the job (months): |
| Name of the Contractor: | Total number of months to complete the job: |
| Address: | Approximate value of the services rendered by your firm under the contract (in United States dollars) |
| Date of commencement of the service (month/year):  Date of completion of the service (month/year): | Number of months of professional staff provided by associated consultants: |
| Name of associated consultants: | Number of officials at a high level from your involved company and duties performed (indicate the most significant profiles such as Director/Project Coordinator, Team Leader): |
| Narrative description of the job: | |
| Description of the services effectively provided by the firm’s staff for the project: | |

Name of the firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TEC-3 Form: Description of the focus, methodology and activities plan for the execution of the job

The technical focus, methodology and work plan are key components of the technical bid. It is suggested that you submit your technical bid (use maximum 50 pages including graphics and diagrams) divided into the following three parts:

1. Technical focus and methodology
2. Work plan, and
3. Staff resources and organization

a) Technical focus and methodology. In this chapter, you must explain your understanding of the objectives of the work, focus of the services, and methodology to carry out the activities and obtain the desired product, and the level of detail of said product. You must highlight the problems that are being dealt with and their significance, and explain the technical focus that you will adopt to deal with them. You must explain the methodology that you propose to adopt and emphasize the concurrence of this methodology with the proposed focus.

b) Work Plan. In this chapter you must propose the principal activities of the work, its content and duration, phases and how they relate, stages (including the contractor’s provisional approvals), and the submission dates of reports. The proposed work plan must be consistent with the technical focus and the methodology, demonstrating an understanding of the ToRs and the ability to translate them into a feasible work plan. Here a list of final documents should be included, including reports, drawings and tables that should be presented as the final product. The work plan must be consistent with the Work Program in the TEC-7 Form.

c) Staff Resources and Organization. In this chapter, you must propose the structure and composition of your team. You must detail the principal disciplines of the work, the key expert responsible, and the appointed technical and support staff. The TEC-5 Form must be presented – CURRICULUM OF PROPOSED PROFESSIONAL STAFF – for the technical staff.

TEC-4 Form Composition of the team and assignment of responsibilities

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name of staff | Area of Specialization | Proposed role | Assigned activity | Proposed hours | |
| HQ | Field1 |
|  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1 Field means the work completed in the contractor’s country and not in the consulting firm’s HQ offices.

TEC-5 Form Curriculum of proposed staff

**1. Proposed role [***only one candidate should be nominated for each position*]:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Name of the firm:** [*insert the name of the firm proposing the candidate*]*:*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Name of individual:** [*insert full name*]*:*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4. Date of birth:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Nationality: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5. Education:** [*Indicate the names of universities and other specialized studies done by the individual, giving the names of the institutions, grades obtained and the dates on which they were obtained.*] \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**6. Professional associations the candidate belongs to:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**7. Other specialties** [*Indicate other significant studies from the grades indicated under point 5 – Where education was obatined.*]*:*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**8. Countries in which the candidate has work experience:** [*List the countries where the individual has worked within the last ten years]*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**9. Languages** [*For each language, indicate the level of competence: good, regular, poor in speaking, reading and writing*]:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**10. Employment History** [*Starting with the current position, list in inverse order each role that the candidate has held since graduating, indicating the following for each position (see the following form): dates of employment, name of the organization, positions held*]:

From [*Year*]: *\_\_\_\_\_\_\_\_\_\_\_\_* Until [*Year*]\_\_\_\_\_\_\_\_\_\_\_\_

Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Positions held: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**11. Details of the assigned activities** [*List all of the tasks that will be performed in this job*]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**12. Jobs completed that best demonstrate the candidate’s capacity to execute the assigned tasks** [*From all of the jobs that the individual has completed, complete the following information for those that best demonstrate the candidate’s capacity to execute the tasks listed in point 11*].

Name of the task or project: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contractor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Main chacteristics of the job: \_\_\_\_\_\_\_\_\_\_\_\_

Activities performed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**13. Certification:**

I, the undersigned, certify that, to the best of my knowledge and understanding, this form accurately describes my person, my qualifications, and my experience. I understand that any intentionally false statement included herein could lead to my disqualification or dismissal, if I am already contracted.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[*Signature of the individual or the individual’s authorized reprsentative*] *Day / Month / Year*

Full name of the authorized representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TEC-6 FORM Calendar of staff activities

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **N°** | **Name of the Employee1** | **Staff contribution (in a bar chart)²** | | | | | | **Total contribution**  **months - staff** | | |
| **1** | **2** | **3** | **4** | **5** | **6** | **HQ** | **Field³** | **Total** |
| **Foreign** | | | | | | | | | | |
| 1 | [HQ] |  |  |  |  |  |  |  |  |  |
| [Field] |  |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| n |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  | | | | | | **Subtotal** | |  |  |  |
| **Local** | | | | | | | | | | |
| 1 | [HQ] |  |  |  |  |  |  |  |  |  |
| [Field] |  |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| n |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  | | | | | | **Subtotal** | |  |  |  |
|  | | | | | | **Total** | |  |  |  |

1. For professional staff the contribution must be indicated individually; for support staff, it should be indicated by category (for example, draughtsman, office employee, etc.)
2. Months are counted from the commencement of the work. For each employee, indicate the contribution separately at HQ and in the field.
3. Field work means work done in a location that is not the consultant’s HQ office.

Full time Part time

TEC-7 Form Work Plan

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **N°** | **Activity¹** | **Months²** | | | | | |
| **1** | **2** | **3** | **4** | **5** | **6** |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| n |  |  |  |  |  |  |  |

1. Indicate all of the main work activities, including the submission of reports (for example, initial, provisional, final reports), and other stages such as approvals by the contractor. For tasks in various phases, indicate the activities, submission of reports and stages for each phase separately. This form should include at least the opening of activities stipulated in point 6.1.
2. The duration of the activities must be indicated in the bar chart.

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## FORMS FOR THE SUBMISSION OF THE PRICE BID

FIN –1 Form Price bid Letter

[*Location, date*]

A: [*Contractor’s name and address*]

Sir/Madam:

We, the undersigned, offer to provide consulting services for [*title of work*] in accordance with your Request for Bids (RFB) and our technical bid.

The Price Bid attached is for the sum of [*total in writing and figures*1]. This figure includes all required taxes and costs for the execution of the contract2.

Our financial bid will be obligatory for all of us, subject to any modifications that may arise from negotiations of the contract, up to the expiration of the bid’s validity period.

We understand that you are not obligated to accept any of the bids you receive.

Sincerely,

Authorized signature: [*full name and initials*]*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Signatory’s name and position: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Name of the firm: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Address: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

The figures must coincide with those indicated under the FIN-2 Form

By virtue of the immunities and privileges granted by Trinidad and Tobago, CAF is exempt from the payment of VAT.

FIN-2 Form Summary of costs

|  |  |
| --- | --- |
| Item | United States dollars  USD |
| Total cost of the Price Bid 1 |  |

Indicate the total cost (excluding VAT- by virtue of the immunities and privileges granted by Trinidad and Tobago, CAF will be exempt from the payment of VAT) payable by the contractor in United States dollars. Said costs must coincide with the sum of the relevant sub-totals indicated in all of the FIN-3 forms provided with the bid.

FIN-3 Form Cost breakdown by activity1

|  |  |
| --- | --- |
| **Group of Activities:**2 | **Description:**3  **Percentage applicable to the cost of services abroad:** 6 |
| Cost Component | **Currency:**4 UNITED STATES DOLLARS |
| Remuneration5 |  |
| Other expenses 5 |  |
| Sub-totals |  |

1  The FIN-3 Form must be completed for the complete work. The consultant must complete a separate FIN-3 Form for each group of activities. The sum of the relevant sub-totals of all FIN-3 forms submitted must coincide with the total cost of the financial bid indicated in the FIN-2 form.

2 The name of the activities must be the same as or match those indicated in the second column of the TEC-7 Form and must at least include the opening of activities established in point 6.1.

3 Brief description of the activities whose cost breakdown is provided in this form.

4 Indicate the name of the foreign currency in square brackets. Use the same columns and currencies as in the FIN-2 Form.

5 The remuneration costs and other expenses must coincide respectively with the total relevant costs indicated in the FIN-4 Forms.

6 The consultant must indicate the cost percentage per activity that corresponds with the services rendered abroad.

FIN-4 Form Breakdown of Remunerations1

[*The information that must be presented in this form will be utilized solely to establish payments to the consultant for possible additional services requested by the contractor*]

|  |  |  |
| --- | --- | --- |
| **Name**2 | **Position**3 | **Month-employee rate**4 |
| **Foreign staff** |  |  |
|  |  | [*HQ*] |
| [*Field*] |
|  |  |  |
|  |
|  |  |  |
|  |
| **Local staff** |  |  |
|  |  | [*HQ]* |
| [*Field*] |
|  |  |  |
|  |
|  |  |  |
|  |

1 The FIN-3 form must be completed for the same professional and support staff listed in the TEC-4 form.

2 Professional staff must be indicated individually; support staff will be indicated by category (for example: draughtsman, office staff).

3 Professional staff positions must coincide with those indicated in the TEC-4 Form.

4 Indicate the rate by month-employee and the currency for the work at HQ and in the field separately.

1. [Delete if there is no partnership.] [↑](#footnote-ref-2)