

GOVERNMENT OF MONTSERRAT

Invitation to Tender (ITT)



Public Sector Buildings Energy Audits and Solar PV assessment in Montserrat

**Ministry of Communication, Works, Labour and Energy
P O Box 344
Brades, Montserrat, MSR 1110**

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1. INTRODUCTION

The Government of Montserrat, is seeking bids for a Consultancy **to provide Energy Audits and Solar PV assessments for ten (10) public sector buildings in Montserrat**. Interested parties are required to submit a bid in accordance with the specifications outlined in Terms of Reference in **Section 6** and Key Deliverables in **Section 6**.

Please read instructions to bidders before completing your submission. Failure to follow instructions may result in your bid being deemed non-compliant and not being considered any further.

The ITT sets out an indicative timetable for the procurement process and provides instructions for Bidders. By participating in this Tender, you are indicating your acceptance to be bound by the guidelines set out in this ITT.

Included are the tender documents, consisting of:

- 1) Invitation to Tender
- 2) Instructions to Tenderers
- 3) Guidance Notes
- 4) Terms of Reference
- 5) Key Deliverables
- 6) Evaluation of Bids
- 7) Respondent's Identification Details
- 8) Technical Questionnaire
- 9) Form of Tender
- 10) Anti-Collusion Statement
- 11) Tender Checklist
- 12) Appendix A – Form of Contract
- 13) Appendix B - General Conditions of Contract

Purpose

- Expects Bidders to submit their Tenders in accordance with the instructions set out in the remainder of this ITT.
- Sets out the overall timetable and process for the procurement to Bidders.
- Provides Bidders with sufficient information to enable them to submit a compliant Tender
- Sets out the Award Criteria and the tender evaluation process that will be used to evaluate the Tenders.
- Explains the administrative arrangements for the receipt of Tenders.

2. THE INVITATION TO TENDER

This is an indicative timetable and may be subject to change.

Project Details	Deliverables
ITT for the Consultancy for Public Sector Building Energy Audits and Solar PV Assessment	Date Published on Government of Montserrat Website and myTenders portal Thursday 11th August, 2022
Access to the ITT Suite of Documents	Hard copy can be downloaded from the Government of Montserrat website at https://tenders.gov.ms/ Electronic tender packs can be downloaded, completed and submitted via the myTenders Portal at https://www.mytenders.co.uk/ If you are intending to make an electronic submission to this tender, please register your interest on myTenders at the earliest opportunity. Please ensure that you allow sufficient time to upload your documents
Clarification deadline and contact details	Tuesday, 23rd August, 2022 Email: Head, Procurement at Jutleh@gov.ms
ITT submission deadline	Wednesday, 14th September 2022 no later than 12.00 midday, (Eastern Caribbean time) 17:00 hours UK time
Tender Submission address	The Chairperson Public Procurement Board, Ministry of Finance and Economic Management, Brades Montserrat MSR1110
Contract Commencement – this is an indicative date and may be subject to change	October 2022

Procurement Process

Suppliers for the **Consultancy for Public Sector Building Energy Audits and Solar PV Assessment** will be selected through this Invitation to Tender (ITT). Potential Bidders who are interested in this opportunity are asked to submit their tender in line with the instructions and guidance contained within this ITT

Process after Submission of Tenders

- ✓ Public Opening by Public Procurement Board – This is usually on the same day as the submission deadline at 2.00 pm in the Human Resources Management Training Room, Upstairs HR Building, provided that we have a quorum).
- ✓ Once the bids have been opened and information on the name of the supplier and the price of the bid is announced and recorded. The public element of the meeting is declared over.
- ✓ The bids are locked away securely.
- ✓ The bids are then passed onto the nominated evaluated team, approved by PPB.
- ✓ The evaluation can take from two (2) – six (6) weeks depending upon the number of bids received.
- ✓ The evaluation team will compile a Tender evaluation report which will be presented to PPB for their consideration and decision.
- ✓ PPB will consider the report and recommendations and will make the final decision.
- ✓ The Procurement department will then send out outcome letters to all bidders via email or hard copy letter if no email address is available.
- ✓ The successful bidder will be advised to contact the Permanent Secretary to arrange a meeting to sign the contract.
- ✓ No services/work must commence until the contract has been signed.
- ✓ There will be on going performance management for each contract that will feed into project completion and closure report. The performance for each contract may be used in assessing future bid submissions.

Evaluation Process

Tender submissions will be evaluated based on the following ITT Evaluation stages:

Stage 1

When evaluating ITT submissions received, we will check them to ensure that:

- they comply with all instructions
- they do not contain any qualifications or conditions,
- they are clear and comprehensive, and
- they are valid and complete

Submissions that are not complete will be eliminated and not considered further

Stage 2

The submissions who meet all the requirements assessed under Section 7 will now have their price submission evaluated.

If the GoM needs to clarify any points, questions will be submitted in writing to the Potential Bidder via email, who will also be required to respond in writing.

Stage 3

Following the outcome of Stage 3, Clarification the GoM will re-moderate the quality scores if applicable and recommend to PPB that an award be made to the organization that has achieved the maximum score.

3. INSTRUCTION TO TENDERERS

Bidders should read these instructions carefully before completing the Bid and submitting a bid. Failure to comply with these requirements for completion and submission of a Bid may result in the rejection of the Bid. Bidders are advised therefore to acquaint themselves fully with all the provisions of this document.

Indicative Budget

The indicative Budget is **EC\$135,000.00 inclusive of all expenses**. Kindly take note that bids should not exceed this amount. Bids exceeding this amount will be rejected.

Authorities

The Authority concerned with this Tender is the Government of Montserrat. The procurement procedure will be managed in accordance with GOM's Procurement Regulations, a copy of which can be found at www.gov.ms

Disclaimer

The information contained in this document is believed to be correct at the time of issue but neither GOM nor their advisors will accept any liability for its accuracy, adequacy or completeness and no warranty is given as such. GOM reserves the right to amend or vary any area of this document during the course of the procurement.

No information contained in this ITT or in any communication made between the GoM and any potential Bidder in connection with this ITT shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this ITT. The GoM reserves the right, subject to the appropriate procurement regulations, to change without notice the basis of, or the procedures for, the competitive tendering process or to terminate the process at any time. Under no circumstances shall the GoM incur any liability in respect of this ITT or any supporting documentation.

The GoM reserves the right to cancel the tender process at any point. The GoM is not liable for any costs resulting from any cancellation of this tender process or for any other costs incurred by those tendering for this Contract.

You are deemed to understand fully the processes that the GoM is required to follow under relevant Procurement regulations 2019.

- The GoM is not making an offer to enter into a contractual relationship by issuing tender documents.
- The GoM is under no express or implied obligation to invite or evaluate tenders from any or all of the companies who respond to this contract notice with a tender submission.
- The issue of the tender documents does not imply any representation by the GoM as to the candidate's financial stability, technical competence or ability in any way to carry out the Services/works. We reserve the right to return to these matters as part of the evaluation process.
- The laws of Montserrat shall apply for the purposes of all proceedings relating to this procurement process and any contract awarded pursuant thereto.

Potential Bidders are requested to note that wherever in the ITT there is a reference to the proprietary name of a service or qualification, or to a specific standard, alternative services or qualifications or standards will be acceptable provided the Potential Bidders can demonstrate that the service, qualification or standard is at least equivalent in quality and specification to the named service, qualification or standard and that the alternative meets all of the GoM's requirements to the Authorities satisfaction.

Confidentiality

All information provided in this document, particularly financial information, shall remain confidential between the organisation and GOM and its advisers. GOM will not share this information with any other organisations or Public Bodies without the permission of the organisation. Similarly, organisations must treat all information provided by GOM and its advisers as confidential.

Respondents are required to respect the confidentiality of the process and must not seek to gain advantage by discussing this process or any potential bid with the Press, any UK or GOM official involved in the process or the United Kingdom Foreign, Commonwealth and Development Office (FCDO). Under no circumstances should direct contact be made with anyone else regarding this process without the prior arrangement or agreement of the GOM Head of Procurement. Failure to observe this confidentiality may result in disqualification from the tender process.

All information supplied by the Contracting Authority in connection with this ITT shall be regarded as confidential except that such information may be disclosed for the purpose of obtaining sureties and quotations necessary for the preparation of responses to this Request for Tender.

Communication and clarification

All communications during the procurement process must be made in writing and be sent by email to:

Name	Harjinder Jutle
Title	GOM Head of Procurement
Email	jutleh@gov.ms

Depending on the requirements of Bidders, GOM is willing to reconsider the stated deadlines to allow a further round of requests for clarification if required. During the procurement process it is up to bidders to check the GoM website for updates. myTenders will send out automatic notifications.

In completing Tender submissions and/or requesting clarification, Bidders must refer back to the numbering format/section as set in the ITT.

- Direct or indirect canvassing of any GoM or, public sector employee or agent by any potential Bidder concerning this requirement, or any attempt to procure information from any GoM or, public sector employee or agent concerning this ITT may result in the disqualification of the potential Bidder from consideration for this requirement.

Participation

Tenders must be submitted by, or on behalf of, the proposed bidder of the services/works. No change in the identity or composition of the Bidder (including the identity or composition of any partner in a consortium or of any sub-contractor to the Bidder) is permitted during the procurement process unless GOM has given its prior approval in writing.

Conflict of interest

Each Tenderer shall make full disclosure of any actual or potential conflict of interest arising from any existing business or personal relationships with any of the following (each, a “Conflicted Person”):

- (i) any employee of the Government of Montserrat;
- (ii) any member of the Government of Montserrat;
- (iii) any family member of any such employee; or
- (iv) any business entity controlled by or otherwise not at arm’s length to any one or more of any such employee, or family member.

Without limiting the foregoing, details should be provided of any direct or indirect pecuniary interest of any Conflicted Person in the supply of the services contemplated by this ITT.

Disclosure of any such actual or potential conflict of interest shall be made in writing with the Tenderer’s response.

Contract Term

The duration of the contract is dependent on the proposal accepted but must be completed within a reasonable time period.

Contract Award

GOM will award a contract on the basis of the award criteria detailed within Section 8 (Evaluation of Bids) of this document.

Once GOM has reached a decision in respect of a contract award, it will notify all Bidders of that decision before entering into any contract.

Contract award is subject to the formal approval process of GOM through the Public Procurement Board. Until all necessary approvals are obtained no Contract will be entered into.

Ownership of Material

Any studies, reports, designs or other material, graphic, software or otherwise, prepared by the Contractor for the Client under the Contract shall belong to and remain the property of the Client (Government of Montserrat). The contractor may retain a copy of such documents and software.

All documents submitted by Tenderers in response to this ITT are to remain the property of the Government of Montserrat.

Limitation of Liability

The Government of Montserrat will have no liability to any person or entity for any damages, including, without limitation, direct, indirect, special or punitive damages, arising out of or otherwise relating to this

ITT, the Tenderer's participation in this ITT process or the Government of Montserrat's acts or omissions in connection with the conduct of this ITT process. This limitation applies to all possible claims by a Tenderer, whether arising in contract, tort, equity, or otherwise, including, without limitation, any claim for a breach by the Government of

Montserrat of a duty of fairness or relating to a failure by the Government of Montserrat to comply with the terms set forth in this ITT.

Contract Requirements

The Technical Specification details the required Service Level Agreements, Key Performance Indicators and overall GoM requirement. The Potential Bidder shall be required to confirm their ability to meet the Technical Specification through the submission of relevant details in fulfilment of the evaluation criteria on **(Section 7)**.

The Potential Bidder shall be expected to agree to the Contract Terms and Conditions prior to contract commencement.

The Potential Bidder's terms of business will not be accepted in lieu of or in addition to the Contract Conditions forming part of this ITT.

Tax Obligations

If locally based, the tenderer must submit a Tax Compliance Certificate from Inland Revenue along with the bidding documents. In the case of a sole trader, the tax compliance certificate should be issued in that individual's name. However, where the sole trader is trading using a business name, the tax compliance certificate should be issued in the business name. In the case of a company, the tax compliance certificate should be issued in the name of the Company". It is therefore incumbent on the bidder to ensure that the tax compliance certificate is issued in the correct name. Diligent checks will be made with the Inland Revenue Department and the Financial Services Commission to verify the accuracy of certificates. Tenders received with improper tax compliance certificates would be rejected.

All Services undertaken will be the subject of taxation in accordance with the current legislation. Except in cases where there is an exemption from tax, of which proof must be provided; residents of Montserrat for tax purposes are subject to tax on the profits from this project while non-residents are liable to a **20% Withholding Tax deduction from the gross amount**. Please take into consideration your tax obligations and liabilities to the Government of Montserrat. For further information please contact Montserrat Customs & Revenue Service (MCRS) via email at irev@gov.ms.

Submission Instructions

- a. Bidders should read these instructions carefully before completing and submitting a bid. Failure to comply with these requirements for completion and submission of a Bid may result in the rejection of the Bid. Bidders are advised therefore to acquaint themselves fully with all the provisions of this document.
- b. The priced information submitted in the Form of Tender must include, (but should not be limited to cover) all the cost essential Public Sector Building Energy Audits and Solar PV Assessment on Montserrat.
- c. The indicative Budget is **EC\$135,000.00 inclusive of all expenses**. Kindly take note that bids should not exceed this amount. Bids exceeding this amount will be rejected.

There are **two (2)** options available for submitting a Tender:

SUBMITTING A TENDER (BID)

- Electronic submissions can be submitted via the myTenders Portal at <https://www.mytenders.co.uk/>

If you are intending to make an **electronic submission** to this tender, please register your interest on myTenders at the earliest opportunity. Please ensure that you allow sufficient time to upload your documents.

- **Hard copies** can be submitted by hand – Please follow the instructions set out below.

Submitting a hard copy of your Tender

You will need two (2) plain envelopes for the Tender submission.

You must follow these instructions. Failure to do so may result in the tender being non-compliant and not considered any further.

Envelope 1.

Follow the steps written below:

- a. Write the name of the Bidder (Tenderer, Supplier) on this envelope.
- b. Write the name of the project and the address on the envelope as written below:

Invitation to Tender for Public Sector Building Energy Audits and Solar PV Assessment on Montserrat

The Chairperson
Public Procurement Board
Ministry of Finance and Economic Management
P.O. Box 292
Brades
Montserrat, MSR1110

- c. Now put this envelope into another plain envelope (Envelope 2)

Envelope 2

Continue following the steps below:

Envelope 1 should now be inside this envelope (Envelope 2), seal the envelope and then write the Project Title and address for Tender return:

Invitation to Tender for Public Sector Building Energy Audits and Solar PV Assessment on Montserrat

The Chairperson
Public Procurement Board
Ministry of Finance and Economic Management
P.O. Box 292
Brades
Montserrat, MSR1110

NB: Envelope 2 must not have the Bidder's name on it or any other markings.

Failure to comply with this requirement will lead to your submission being deemed non-compliant and not considered any further.

Tenders are to be delivered to the address above by **12:00 midday Eastern Caribbean time, 17:00 UK time on Wednesday, 14th September 2022.**

Tenderers will be given a receipt.

4.0 GUIDANCE NOTES

Bidders should read these instructions carefully before completing the Bid and submitting a bid. Failure to comply with these requirements for completion and submission of a Bid may result in the rejection of the Bid. Bidders are advised therefore to acquaint themselves fully with all the provisions of this document.

1. GOM reserves the right to amend or terminate the procurement procedure or change the timings outlined in this ITT.
2. The GoM reserves the right to issue additional documentation at any time during the tendering process to clarify any issue or amend any aspect of the ITT. All such further documentation that may be issued shall be deemed to form part of the ITT and shall supplement and/or supersede any part of the ITT to the extent indicated.
3. Potential Bidders must obtain for themselves at their own expense all information necessary for the preparation of their Tenders.
4. Under the Contract the GoM will require compliance with its policies. Potential Bidders are advised to satisfy themselves that they understand all the requirements of the service requirements and Contract before submitting their Tender. Where additions or amendments are made to the clauses included in the Supply of Services Agreement and are issued during the tendering process they shall supplement and/or supersede previous versions
5. Any changes to the procurement timetable shall be published as an Addendum on both websites; GoM and myTenders.
6. The Montserrat General Conditions of Contract will be adopted for this Contract as attached below. Bidders are advised to satisfy themselves that they understand all the requirements of the Contract before submitting their Tender.
7. The bidder will be deemed to have inspected the site and be familiar with the environment and working conditions on the site.
8. Bidders are to provide all documents or information requested as part of the Quotation Evaluation.
9. Where necessary, bidders will be expected to contact the utility companies to ensure that the proposed works do not disrupt any of the services. Bidders are responsible for repairing any damages incurred to any of the utilities during the completion of the works.
10. The successful bidder should submit details of their current insurance sufficient to satisfy the requirements for insurance given in the Conditions of the Contract and the Specification. The insurance shall jointly indemnify the Contractor in the amount that is the greater of either EC\$30,000.00 or the submitted price. Where necessary, this will be requested before the signing of the Contract.
11. Tenderers must complete, sign and return Tender Submission Check List, with all the required documents to constitute a compliant Bid. Failure to comply with this requirement will lead to bids being deemed non-compliant and failing to pass the administrative compliant stage. (Stage 1).
12. Tenderers are to provide all document or information requested as part of their tender submission. Bidders must obtain for themselves at their own expense all information necessary for the preparation

of their Tenders.

13. Tenders must be returned in line with the instructions for submitting a Tender. Late submissions will not be considered.
14. All tenders will be arithmetically checked; any errors will be brought to the tenderers attention. The rates supplied would be the basis for the arithmetic correction and would be the determining factor for any queries about the corrected price.
15. Tenderers are not permitted to submit alternative tenders.
16. The Government of Montserrat is not bound to accept the lowest tenderer and has the right to accept and reject any tender offers.
17. Validity Period - The bids must remain valid for acceptance for a **one hundred and twenty (120)** days after the submission deadline, to allow time for evaluation, selection and any unforeseen delays. Should circumstances arise that require an extension to this period, we will seek to do this in writing.
18. Tenders must be completed in the English language or a full English translation provided at no cost to The GoM.
19. The submission will be checked for completeness and compliance before responses are evaluated.
20. Any signatures must be made by a person who is authorised to commit the Potential Bidder to the Contract.
21. This ITT is made available in good faith. No warranty is given as to the accuracy or completeness of the information contained in it and any liability or any inaccuracy or incompleteness is therefore expressly disclaimed by the GoM and its advisers.
22. Where Potential Bidders believe that they are unable to submit a Tender through the electronic system or deliver a hard copy or require assistance or further information to be able to use the myTenders portal, they must contact the GoM via email no later than four (4) calendar days before the Tender submission due date, to enable any technical queries to be investigated and resolved.
23. Neither the contract nor any work to be performed under the contract or any part hereof may be Assigned by the Successful Tenderer without the prior written consent of the Government of Montserrat. Such written consent however shall not under any circumstances relieve the Successful Tenderer of its liabilities and obligations under the Contract and the granting of such consent shall be within the sole and unfettered discretion of the Government of Montserrat.

24. Health and Sanitation

All local health and sanitation requirements must be met at all times. This shall include the wearing of gloves, hair coverings and aprons by staff as appropriate.

COVID 19 regulations/protocols must be adhered to.

The highest standards of sanitation must be maintained throughout the contract period.

25. Criminal Record Checks

The service provider shall provide documentary evidence that criminal background checks were conducted on each of its employees prior to hiring, and shall refuse employment to any person

convicted of an offence or any other crime that indicates the person poses a threat to the physical safety to employees in the workplace.

The supplier shall not assign any employee to provide services pursuant to this Contract if the said worker has ever been convicted of an offense or any crime involving assault, sex offences, violence, or drugs; or if the said worker has engaged in any crime or conduct indicating that the worker may pose a threat to the safety or well-being of employees.

Officials reserve the right to prohibit any employee of the Supplier from providing works/services if it is determined, in its sole discretion, that such employee poses a threat to the safety or well-being of personnel or others.

5. **ADDITIONAL INFORMATION**

• **Environmental Issues**

The GoM is committed to the protection of the environment and the promotion of sustainable environmental development. Potential Bidders should note the various obligations contained within the Contract, which will ensure that the successful Potential Bidder will provide the Contract in a non-detrimental manner to the environment.

• **Equalities & Diversity**

The GoM is committed to providing its services in a way, which promotes equality of opportunity at every possibility. It is expected that the successful Potential Bidder will be equally committed to equality and diversity in its service provision and will ensure compliance with all anti-discrimination legislation.

Potential Bidders should note that the successful Potential Bidder would be asked to contract with the GoM to ensure that they adhere to these obligations and that the GoM will be able to monitor its compliance throughout the Contract Period. The GoM expects each Potential Bidder to state whether they would agree to be bound by such contractual obligations.

• **Financial Guarantee**

The GoM reserves the right to require the successful Potential Bidder to provide as security for the performance of the Contract, a performance bond or otherwise or as an alternative, require the parent company of the successful Potential Bidder to guarantee the performance of the Contract prior to the award of the Contract

• **Sub-Contracting and Consortia Arrangements**

Where a sub-contracting approach is proposed, all information requested should be given in respect of the prime contractor.

Where sub-contractors will play a significant role in the delivery of the services or products under any ensuing contract, please indicate in a separate annex (by inserting the relevant company/organisation name) the composition of the supply chain, indicating which member of the supply chain will be responsible for the elements of the requirement.

It is recognized that arrangements in relation to sub-contracting may be subject to future change. However, Potential Bidders should be aware that where sub-contractors are to play a significant role, any changes to those sub-contracting arrangements may constitute a material change and therefore may affect the ability of the Potential Bidder to proceed with the procurement process or

to provide the goods and/or services.

If the Potential Bidder bidding for a requirement is a consortium, the following information must be provided:

- full details of the consortium; and
- the information sought in respect of each of the consortium's constituent members as part of a single composite response.

Potential Bidders should provide details of the actual or proposed percentage shareholding of the constituent members within the consortium in a separate annex. If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided in the annex. However, please note the GoM reserves the right to require a successful consortium to form a single legal entity.

The GoM recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Bidders should therefore respond in the light of the arrangements as currently envisaged. Potential Bidders are reminded that any future proposed change in relation to consortia must be notified to the GoM so that it can make a further assessment by applying the selection criteria to the new information provided.

- **Sustainability**

The GoM has a statutory requirement to ensure compliance with a number of corporate considerations when providing its services either directly or via a third party. Consequently, the GoM is looking for a commitment within Tenders to assist the GoM in the following duties: Health and Wellbeing; Our Local Economy; Smarter Travel Environmental Issues

Potential Bidders should note that the successful Potential Bidder would be asked to contract with the GoM to ensure that they adhere to these obligations and that the GoM will be able to monitor its compliance throughout the Contract Period. The GoM expects each Potential Bidder to state whether they would agree to be bound by such contractual obligations.

- **Developing the Local Economy**

The sustainable development goal places an obligation on Government of Montserrat to consider how what is being procured will improve the economic, social and environmental well-being of our local area.

- **Tenderer Performance**

The selected Tenderer may be evaluated throughout the course of service delivery in connection with any specific work or projects undertaken as a result of any agreement entered into between any Tenderer and the Government of Montserrat. The Government of Montserrat may also conduct periodic reviews/assessments of any selected Tenderer, taking into consideration, in addition to specific work related to the project undertaken by the Tenderer, ongoing Tenderer staff qualifications, experience, training, and staff changes. Any evaluation/assessment will be shared with the Tenderer, with the goal of immediate and permanent resolution where concerns have been raised. The Government of Montserrat reserves the right to remove from the roster any selected Tenderer who has been qualified by this ITT process by way of written notice if, in the sole discretion of the Government of Montserrat, based on any on-going or specific evaluation or assessment of the Tenderer or its performance of any work, it is deemed to be in the Government of Montserrat's best interests.

- **Payments and Deposits**

Invoices will be paid within fourteen (14) days from the approval date of the invoice.

- **Insurance and Workers Compensation**

Mandatory Eligibility Requirements

As a mandatory eligibility requirement for response to this ITT, the Successful Tenderer shall carry at all times during the performance of the work Professional Indemnity Insurance not less EC\$1,000,000.00, (where applicable).

Responsibilities of Successful Tenderer

- (a) The Successful Tenderer shall supply insurance coverage and pay all costs and expenses, including premiums relating to the insurance coverage requirements as set out herein, and shall supply the Government of Montserrat with a certificate of insurance for all policies on an annual basis. Such policies will include a statement that the coverage shall not be terminated without a prior 30-day written notice to the Government of Montserrat.
- (b) The Successful Tenderer or their insurer will notify the Government of Montserrat at least thirty (30) days prior to any change in insurer, any cancellation of the insurance policy, or any substantial change in the policy or coverage that would materially alter the coverage provided by the Successful Tenderer to the Government of Montserrat.

- **Indemnification**

The Successful Tenderer agrees to indemnify and save harmless the Government of Montserrat, its councilors, officers, agents, representatives, and employees, against all suits or claims, requests, legal action and liability regardless of the nature and expenses sustained from injuries or death or any damages or loss to property as a result of the usage of premises or in the execution of the Successful Tenderer functions arising from this contract except to the extent of the Government of Montserrat's gross negligence.

At no time will the Government of Montserrat be responsible for any injury sustained by the Successful Tenderer, their employees or any person on the Government of Montserrat's premises, nor will the Government of Montserrat be responsible for any loss, including loss of profits or damage caused to the goods of the Successful Tenderer, their employees or any other person, including damage to vehicles and their contents, while these goods are on the Government of Montserrat's premises or site.

The Government of Montserrat shall not be liable for any incidental, indirect, special or consequential damages or any loss of use, revenue or profit of the Successful Tenderer arising out of or in any way related to this ITT or subsequent contract.

6.0 TERMS OF REFERENCE

The following are the Terms of Reference for the assignment:

1. Background

- 1.01 Government of Montserrat (GoM) spends a considerable amount of its total annual recurrent budget on electricity. Like many overseas countries and territories (OCTs), Montserrat is highly dependent on imported fossil fuels for electricity generation, and this exposes the country to the volatility of fuel prices and shipment delays. Montserrat's 2020 Energy Intensity measured at 4,650.5BTU per US dollar, which is the highest in the Organization of Eastern Caribbean States

(OECS) grouping. The energy intensity measures the energy efficiency of an economy, and a high intensity indicates a low financial return or GDP output per unit of energy expended. With the cost of fuel forecasted to increase, energy conservation becomes one of the most effective means to reduce energy cost and is a key path to developing a sustainable energy future.

- 1.02 In 2020, GoM occupied buildings accounted for 12.6% of the island's electricity sales, with an average electricity cost of US\$0.38/kWh, which is among the highest in the region. This places a significant strain on the government's recurrent expenditure, which is already heavily subsidized by Donor Aid. The successful implementation of this project will significantly reduce the government's utility cost and allow financial resources to be directed to more essential services and needs.
- 1.03 Another pathway to reducing energy consumption is to change human behavior. Given that GoM employs 50% of the islands working population, we have an ideal opportunity to influence behaviors around energy efficiency. As a result, one of the major objectives of this project is to provide training on energy conservation and energy efficiency and energy conservation solutions, they will be able to apply the learnings at work and home further influencing other members of the household.
- 1.04 In light of the above, this consultancy is geared at highlighting cost effective measures towards improving the energy efficiency within the public service. The energy audits conducted will help us to determine the areas of wastage, develop and implement practical, affordable and financially feasible solutions that staff and the general public can implement to reduce energy cost.

2. Objectives

- 2.01 The main objective is to conduct ASHRAE Level 2 energy audits and solar PV assessments in ten (10) government occupied and owned buildings. The consultant would also be required to provide theoretical and hands-on training to ten (10) public sector staff members. These activities are geared at highlighting energy management opportunities to improve the effective use of energy within government building.

3. Scope

- 3.1 The Consultant will perform individual EAs and solar PV assessments for ten (10) public sector buildings, in Montserrat. A brief profile of these facilities, is shown in **Table 1**. The services are to be conducted in accordance with generally-accepted international standards and professional practices acceptable to GoM. For EAs the Regional Energy Efficiency Building Code (REEBC) Caribbean Standard (2018 IECC with integrated CAD requirements) and ASHRAE energy auditing standards will be followed.
- 3.2 Pre-audit activities will include, but not be limited to, the following:
 - (a) Liaising with GOM's focal point, to review the Terms of Reference (TORs), logistical arrangements and supporting documents for executing the audits, i.e.:
 - (i) familiarisation with EE/RE solutions relevant to the sector and local and regulatory environment; and

- (ii) assessing historical utility billing information (electricity, fuel, water) to conduct pre-site visit utility billing analyses.
- (b) Meeting with representatives of GOM to discuss the audit approach, final assignment of EA level for individual facilities, a schedule for executing the EAs and to present pre-audit findings.

TABLE 1: Summary Profiles of the public sector buildings and Indicative consumption

No.	Name of Buildings	Location	**Avg Energy Use kWh/month (2020-21)	Annual Consumption (kWh) (2020-21)
1	Osborne Building	Little Bay	9,220.80	110,649
2	Physical Planning	Brades	1,573.8	18,885
3	Lands & Survey Department	Brades	2,510	30,120
4	Montserrat Community College	Salem	3,405.1	40,861
5	J.A. Osborne Airport Terminal	Gerald's	11,725.8	140,710
6	ZJB Radio	Davy Hill	5,153.2	61,838
7	Government Headquarters ¹	Brades	33,640	403,680
	Total		67,228.7	806,744.4

3.3 Activities for EAs will include, but not be limited to, the following:

- 3.3.1 Conducting interviews with key personnel of each facility and acquiring and
 - 3.3.1.1 reviewing relevant documentation and data, including:
 - 3.3.1.2 obtaining historical energy consumption by year and month and conduct billing analysis;
 - 3.3.1.3 determining operational experience of equipment and facility and discussion of challenges;
 - 3.3.1.4 gathering retrofit plans, operation schedules, manuals, equipment, maintenance history, failure reports, architectural and engineering plans; and
 - 3.3.1.5 where relevant, obtaining earlier EA reports, including energy performance since those audits were conducted, and reviewing accomplished EE upgrades.
- 3.3.2 Conducting an inspection of each of the facilities and major equipment. This

¹ Contains several buildings

activity should be executed in detail, allowing the formulation of a reliable baseline, identification of energy losses and design of EE/RE measures.

Activities shall include:

- 3.3.2.1 inspection of major equipment, including: capacity, operation modes, operation time, efficiency/performance, condition and age and energy consumption, photographs to capture state of the equipment and facility;
 - 3.3.2.2 inspection of building envelope, including: materials, structure, air infiltration, condition and age, photos;
 - 3.3.2.3 commentary on status of electrical installation and maintenance of each of the facilities;
 - 3.3.2.4 identification of any construction improvements that can enhance the efficiency of the EEM proposed; and
 - 3.3.2.5 supporting report, with photos.
- 3.3.3 Determine operational parameters and verify energy losses: electrical power and energy logging (kilowatt (kW), kilowatt-hour (kWh), cable size and power factor. This should be done for the whole facility, for a typical day, and minimum spot power measurement for major equipment. Profile measurements of air-conditioning and lighting circuits and other major equipment are required to establish operating times and their share in the energy and demand distribution. Where there is a central air-conditioner, typical-day logging (energy consumption, time and temperature) is required. Develop a single line diagram highlighting power distribution within the facility.
- 3.3.4 Conduct indoor air quality testing and light level measurements
- 3.3.5 Discussing preliminary findings with the relevant representative of each facility to secure feedback on suitability potential EE/RE measures.
- 3.3.6 Conducting off-site energy use and cost analyses based on verified energy consumption and other utility data for the whole facility in each case, including:
- 3.3.6.1 analyzing historic energy (and other utilities') consumption data associated with the facility;
 - 3.3.6.2 developing facility energy-use indices and cost indices and compare with benchmarks;
 - 3.3.6.3 developing energy-use and demand balances for the facilities, identifying energy end-use distribution; and
 - 3.3.6.4 Extend energy use and demand balances to floors or building sections.
- 3.3.7 Compare energy performance — Determine energy use indices (EUI) and compare them internally from one period to another, from one facility to a similar one, from one system to a similar one, or externally to best practices available within the energy industry
- 3.3.8 Conducting technical and economic analyses, using energy equipment inventory, operational information and measured data collected on site, including:

- 3.3.8.1 Identify Energy Management Opportunities (EMOs) — Include operational and technological measures to reduce energy waste. This will be categorized by operational, low — no cost and capital investment energy management opportunities. Each Low- No cost and Capital Investment Energy Management Opportunities will include its initial cost, annual energy savings cost, simple payback period, component percentage energy savings and carbon dioxide savings. Lastly all Capital Investment Energy Management Opportunities will be ranked according to Triple Bottom Line Evaluation (if applicable) also an overall internal rate of return and net present value. screening the list of EE/RE measures to establish a recommended short-list of cost-effective measures, using acceptable simple pay-back thresholds. The screening threshold must be clearly stated;
- 3.3.9 Providing a description of facility, operations and maintenance, including general layout and design. Identify Operational and Behavioral Measures— Include operational and behavioral measures to reduce energy waste. This will include possible management changes (establishment of an Energy Committee) and behavioral changes in using existing equipment
- 3.3.10 Benchmarking — This will involve benchmarking the facility against industry standards set by globally recognized institutions or bodies. Benchmarking levels such as energy use per unit area (kWh/m²)
- 3.3.11 Elaborating on each recommended EE measure in detail, including:
- 3.3.11.1 describing baseline and proposed scenario, including calculations of energy consumption of both scenarios, energy savings and emission savings;
- 3.3.11.2 identifying minimum performance parameters for suggested materials and equipment, to inform the design of the technical solution;
- 3.3.11.3 Determine maintenance or waste disposal issues if any; and
- 3.3.11.4 Conducting basic economic analysis, including the following tasks for each identified measure/option:
- (a) Determine investment costs, detailing material/equipment and installation costs;
 - (b) Calculate energy cost saving;
 - (c) Determine other benefits, e.g. operational and maintenance cost savings and impact on behaviour change of the proposed measure; and
 - (i) analysis of the Energy Management System and Culture of the organization; reflected in the “Energy Management Matrix”.
 - (j) Drafting EA reports for each facility including key aspects of the analyses.

- 3.4 Activities for solar photovoltaic (PV) assessment will include, but not be limited to, the following:
 - 3.4.1 Conducting site assessment for potential implementation of solar PV at respective facilities, including:
 - 3.4.1.1 assessing the availability of roof space for a PV system and space to accommodate auxiliary PV equipment, as well as review general condition of the roof; and
 - 3.4.1.2 assessing site orientation and shading impacts.
 - 3.4.2 Conducting for each facility an assessment and determining preliminary schematic PV system design parameters, including:
 - 3.4.2.1 assessing structural and electrical restrictions and impacts of surroundings;
 - 3.4.2.2 establishing a preliminary schematic design of an optimal PV plant;
 - 3.4.2.3 determining key design parameters including (panel area, orientation, direction, tilt angle, peak capacity);
 - 3.4.2.4 projecting annual energy yield of the preliminary design; and
 - 3.4.2.5 estimating project cost, including material, installation and operation and maintenance; consulting with local PV suppliers to ensure a realistic estimate.
 - 3.4.3 Incorporation of key aspects of the solar PV assessment in the EA report of respective facilities. Provide PV system analyses using future climate scenarios with accompanying solutions tailored to mitigating those impacts.
- 3.5 The Consultant will be required to make a formal presentation of the findings of EAs to the GOM
- 4 The Consultant would also be required to develop and delivered a theoretical training course on Energy Auditing to ten (10) participants and to provide hands-on training during the execution of the of the scope of work to these individuals.
- 5 Consultants are required to submit a **TRAINING PLAN** as part of their proposal.

7.0 KEY DELIVERABLES

The Consultant will be required to provide the following deliverables:

Item	Description	Work Schedule	Payment Plan
1	Brief Inception Report [less than four (4) pages] including updated work- plan for the overall energy auditing of the facilities; confirming understanding of the assignment and confirming the scope.	One (1) week after Launch Meeting	50% of Contract sum
2	Draft Energy Audit Report as an electronic Microsoft Word Document file for each facility; and electronic spreadsheet file of energy use model and SE Analyses	Seven (7) weeks after start of project	25% of Contract sum

3	<p>Final Energy Audit Report for each facility audited, inclusive of designs, Technical Specification of equipment being proposed to retrofit:</p> <p>(a) A summarized Report based on all the buildings facilities audited.</p>	<p>Seven (7) days after submission of comments from GOM</p>	<p>25% of Contract Sum</p>
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7.1 In addition to the above, Reports should:

7.1.1 comment on the state of electrical installation in each facility/building (supported with photos);

7.1.2 comment on any building rehabilitation work necessary so as to optimize EEM/REO (supported with photos); and

7.1.3 provide photos which capture the conduct of EA at various points.

7.1.4 All submissions should be electronic files in both Microsoft Word format and PDF format

8.0 BID EVALUATION

The following evaluation criteria will be used to evaluate Bids received in response to this ITT. Administrative Compliance will be applied before the remaining criteria can be assessed, and will be graded as either a Pass or Fail, with failure meaning that bids would be deemed Non-compliant. Bids will be evaluated over a total score of **100 marks** and bidders must achieve a minimum score of **60%** of the quality score to be considered for award of contract.

EVALUATION CRITERIA	TOTAL SCORE (MARKS)
Administrative Compliance	PASS/FAIL
Qualifications & Experience i. Team Leader - [15] ii. Energy Technician One (1) - [5] iii. Energy Technicians Two (2) - [5]	25
Adequacy and quality of the proposed Methodology , and Work Plan i. Methodology - [15] ii. Work plan - [10] iii. Organization and Staffing - [10]	25
Technical Questionnaire	30
Cost Proposal	20
TOTAL	100

8.1 Administrative Compliance (PASS/FAIL)

Bidders must submit all the documents requested mentioned bellow and in the **ITT Document Checklist**.

- a. Completed Form of Tender
- b. Completed Cost Breakdown Template on Appendix A
- c. Tax Compliance Certificate (if bidder is a local company)

- d. Signed Respondent's Identification Details
- e. Signed Anti-Collusion Statement
- f. Proposed methodology, and work plan in responding to the Terms of Reference
- g. Company profile which includes previous relevant work experience and qualifications (Curriculum Vitae) of key experts; Team Leader and Two Energy Technicians
- h. Completed Technical Questionnaire and
- i. A Training Plan

This is a **PASS/FAIL** criterion. If all the above requirements are fulfilled, then the bidder would move onto the next stage of the evaluation. If any of the above-mentioned items are not submitted, then the Tender would be deemed non-compliant and rejected.

8.2 Qualifications and Experience – (25 marks)

Prospective key consultants should have the following minimum qualifications:

(a) Team Leader: - (15 marks)

- (i) a Masters' level degree or higher in Electrical Engineering, RE, Civil Engineering, Environmental Engineering, Environmental Engineering Technology, Environmental Technology, Pure and Applied Science or an appropriate and equivalent qualification
- (ii) an appropriation certification as an Energy Auditor, RE expert or Energy Manager
- (iii) knowledge of lighting and control systems, applicable codes, rules and standards, building performance, HVAC, residential electrical systems, construction methods, materials practices and site surveying techniques, familiarity with software programs in auditing, residential construction and building energy modelling, ability to conduct Energy Star tests using duct blasters, familiarity with infrared cameras and blower door equipment, using basic power and hand tools, trained in handling lead-based paint is required;
- (iv) a minimum of 8 years" industry (engineering and/or energy) experience and a member of a nationally or internationally recognized body or association;
- (v) a minimum of five years" experience in carrying out EAs; and
- (vi) advanced knowledge of RE technologies, building management, control systems, and/or energy modelling.

(b) Energy Technician One (1) – (5 marks)

- at least a two-year Associate Degree in Engineering or RE. A Bachelor of Science degree in Engineering or RE, or equivalent, would be an asset;
- basic knowledge in RE technologies, building management, control systems and energy modelling;
- a minimum of two years" industry (engineering and/or energy) experience;
- a minimum of two years' experience participating in an EA team; and
- conducted at least four commercial EAs;

(c) Energy Technician Two (2) – (5 marks)

- at least a two-year Associate Degree in Engineering or RE. A Bachelor of Science degree in Engineering or RE, or equivalent, would be an asset;
- basic knowledge in RE technologies, building management, control systems and energy modelling;

- a minimum of two years' industry (engineering and/or energy) experience;
- a minimum of two years' experience participating in an EA team; and
- conducted at least four commercial EAs;

8.3 Methodology - (25 Marks)

(a) Technical Approach and Methodology: - (15 marks)

Please explain your understanding of the objectives of the assignment as outlined in the TOR, the technical approach and the methodology you would adopt for implementing the tasks to deliver the expected output(s), and the degree of detail of such output. Please do not repeat/copy the TOR in here.

(b) Work Plan: - (5 Marks)

Please outline the plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and tentative delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing your understanding of the TOR and ability to translate them into a feasible working plan. A list of the final documents (including reports) to be delivered as final output(s) should be included here. The work plan should be consistent with the Work Schedule.

(c) Organization and Staffing: - (5 marks)

Please describe the structure and composition of your team, including the list of the Key Experts, Non-Key Experts and relevant technical and administrative support staff. Also state your experience in implementing similar projects in the Caribbean or regions with similar conditions.

8.4 Technical Questionnaire (30 marks)

Complete the Technical Questionnaire in **Section 10**.

8.5 Cost Proposal - (20 Marks)

Bidders must complete and sign the Form of Tender and return them with their ITT submission.

The indicative budget is EC\$135,000.00 inclusive of all expenses.

The Bid price is a significant factor and the Government of Montserrat will seek to ensure that the services are undertaken at the most economically advantageous price. The Government of Montserrat is not bound to accept the lowest or any Bid. The percentage for this criterion will be calculated as described below:

The lowest price bidder will achieve the maximum score for this criterion. All other (higher) bids will be evaluated relative to the lowest bid price using the formula shown below:

Given a full Cost Proposal score of 20%:

$$\text{Cost Score} = \frac{\text{Lowest Price (A)}}{\text{Higher Price (B)}} \times 20\%$$

For example, Lowest Price (A) = 10,000 and Higher Price (B) = 14,000

$$\text{Cost Score} = \frac{10000}{14000} \times 20\% = 14.3\%$$

8.6 Quality Evaluation of Methodology

Quality will be measured upon evaluation of Bidder's Methodology Statement. The methodology statement criterion is marked using the following scores:

Scoring – Quality Criteria	
Rating of Response	Score
Very Good Submission which articulates clearly the steps to be taken to conduct Energy Audits, solar assessments and energy audit training, indicating clear assumptions, articulating clearly proposed actions to gather and process required information, and highlighting report structure. Clearly include all the information requested and instils full confidence that the Tenderer has the ability to fully meet the requirements of the Contract.	5
Good or Fully Compliant Submission which articulates the steps to be taken to conduct Energy Audits, solar assessment and energy audit training, indicating assumptions, articulating clearly proposed actions to gather and process required information, and highlighting report structure. Includes all the information requested and instils reasonable confidence that the Tenderer has the ability to fully meet the requirements of the Contract.	4
Satisfactory or Compliant Submission which meets the essential requirements and is explained in adequate detail. Although brief or lacking some detail, all the information requested has been supplied and the Council is relatively confident that the Tenderer has the ability to meet the requirements of the Contract.	3
Weak or Partially Compliant (Minor issues) Submission which in some areas falls short of requirements and is poorly explained. Not all of the information requested has been supplied and The Council has minor concerns regarding the Tenderers ability to meet the requirements of the Contract.	2
Unacceptable or Non-Compliant (Major issues) Submission which clearly fails to meet requirements and is not explained. Key information requested has not been supplied and the Council has major concerns regarding the Tenderers ability to meet the requirements of the Contract.	1

9.0 RESPONDENT'S IDENTIFICATION DETAILS FORM

A		PERSONAL INFORMATION	
BUSINESS NAME:.....REGISTRATION NUMBER:.....			
BUSINESS ADDRESS:.....			
.....			
CONTACT PERSON:.....POSITION:.....			
TELEPHONE NUMBER(S):.....WEBSITE:.....			
EMAIL ADDRESS:			
B		QUESTIONNAIRE	
1	Your entity operates as which one of the following?	<input checked="" type="checkbox"/>	Tick the applicable response
		<input type="checkbox"/>	Sole Proprietorship
		<input type="checkbox"/>	Partnership
		<input type="checkbox"/>	Limited Liability
		<input type="checkbox"/>	Others
2	How many years has your entity been in operation?	<input type="checkbox"/>	(0-1)
		<input type="checkbox"/>	(1-3)
		<input type="checkbox"/>	(3-5)
		<input type="checkbox"/>	(5-10)
		<input type="checkbox"/>	(10 & Over)
3	Number of Employees within your entity?	<input type="checkbox"/>	(1-5)
		<input type="checkbox"/>	(6-10)
		<input type="checkbox"/>	(11-15)
		<input type="checkbox"/>	(16 & Over)
4	How many similar contracts has your entity successfully completed in the last 2 years?	<input type="checkbox"/>	(1-3)
		<input type="checkbox"/>	(4-6)
		<input type="checkbox"/>	(7-9)
		<input type="checkbox"/>	(10 & Over)
5	What is the highest sum of any of the contracts completed in the last 2 years?	<input type="checkbox"/>	(50-100)K
		<input type="checkbox"/>	(101-200)K
		<input type="checkbox"/>	(201-400)K
		<input type="checkbox"/>	Over 400K
6	Has your entity failed to complete a contract for a public or private entity?	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO
C		SIGNATURE	
I hereby certify that the information outlined in this document is true and accurate to the best of my knowledge and belief. I understand that any false statement may result in a denial of a contract and possible debarment from future prospects.			
.....			
Signature of Business Representative			
.....			
Date			
			Business Name/Stamp

10.0 Technical Questionnaire (20 marks)

Weighted quality scores will be calculated by multiplying the score for each quality question by its individual weighting. The weighted scores will be totaled for each bid.

<p>Question 1: (20%)</p> <p>Describe your knowledge and experience of undertaking energy initiatives and explain how this knowledge and experience will support the delivery of this scope. (This section should not exceed 500 words)</p>
<p>Bidders Response</p>
<p>Question 2 (10%)</p> <p>Describe your knowledge and experience of Solar PV assessment and explain how this will lead to the appropriate recommendations</p> <p>(This section should not exceed 500 words)</p>
<p>Bidders Response</p>
<p>Question 4 (5%)</p> <p>Explain how you will ensure your proposals will strengthen administrative and management practices and procedures for cost effective, modern and excellent service delivery.</p> <p>(This section should not exceed 250 words)</p>
<p>Bidders Response</p>
<p>Question 5 (5%)</p> <p>Explain how you will identify required staff competencies (knowledge, skills, behaviour and attitude) in order to promote performance, productivity and achieve the ToRs</p> <p>(This section should not exceed 250 words)</p>
<p>Bidders Response</p>
<p>Question 10 (10%)</p> <p>What resources will you dedicate to the completion of this project? Please include your availability, on site and off site, working days and hours. (This section should not exceed 500 words)</p>
<p>Bidders Response:</p>

11.0 FORM OF TENDER

The Chairperson
Public Procurement Board
Ministry of Finance and Economic Management
P.O. Box 292
Brades, Montserrat, MSR1110

Dear Sir/Madam

Invitation to Tender - Consultancy for Public Sector Building Energy Audits and Solar PV Assessment

I/We the undersigned undertake to complete the above service in accordance with the General Conditions of Contract Specifications for the sum of:

EC\$.....

(words).....

.....

If my/our tender is accepted, I/We undertake to commence the Works within **days** from the date of receipt by me/us of the official order and complete the works within **days/weeks** from the date of receipt by me/us of the official order.

I/We understand I/We shall not be reimbursed for any costs that may have been incurred in compiling this Tender.

I/We confirm this tender shall remain valid for a period of **one hundred and Twenty (120)** days from the date of submission of this Tender.

Name.....

Signed.....

Name of Company.....

Address.....

Tel. number.....

Email address:

Date.....

GOVERNMENT OF MONTSERRAT
TENDER SUBMISSION ANTI-COLLUSION CERTIFICATE

I/WE CERTIFY THAT THIS TENDER IS MADE IN GOOD FAITH, AND THAT WE HAVE NOT FIXED OR ADJUSTED THE AMOUNT OF THE TENDER BY OR UNDER OR IN ACCORDANCE WITH ANY AGREEMENT OR ARRANGEMENT WITH ANY OTHER PERSON. I/WE ALSO CERTIFY THAT WE HAVE NOT AND I/WE UNDERTAKE THAT WE WILL NOT BEFORE THE AWARD OF ANY CONTRACT FOR THE WORK:

DISCLOSE THE TENDER PRICE OR ANY OTHER FIGURES OR OTHER INFORMATION IN CONNECTION WITH THE TENDER TO ANY OTHER PARTY (INCLUDING ANY OTHER COMPANY OR PART OF A COMPANY FORMING PART OF A GROUP OF COMPANIES OF WHICH I AM/WE ARE A PART OF) NOR TO ANY SUB-CONTRACTOR (WHETHER NOMINATED OR DOMESTIC) NOR SUPPLIER (WHETHER NOMINATED OR DOMESTIC) OR ANY OTHER PERSON TO WHOM SUCH DISCLOSURE COULD HAVE THE EFFECT OF PREVENTING OR RESTRICTING FULL COMPETITION IN THIS TENDERING EXERCISE

ENTER INTO ANY AGREEMENT OR ARRANGEMENT WITH ANY PERSON THAT THEY SHALL REFRAIN FROM TENDERING, THAT THEY SHALL WITHDRAW ANY TENDER ONCE OFFERED OR VARY THE AMOUNT OF ANY TENDER TO BE SUBMITTED OR OTHERWISE COLLUDE WITH ANY PERSON WITH THE INTENT OF PREVENTING OR RESTRICTING FULL COMPETITION

PAY, GIVE OR OFFER PAY OR GIVE ANY SUM OF MONEY OR OTHER VALUABLE CONSIDERATION DIRECTLY OR INDIRECTLY TO ANY PERSON FOR DOING OR HAVING DONE OR CAUSING OR HAVING CAUSED TO BE DONE IN RELATION TO ANOTHER TENDER OR PROPOSED TENDER FOR THE WORK ANY ACT OR THING OF THE SORT DESCRIBED AT I), II) OR III) ABOVE.

I/WE FURTHER DECLARE THAT I/WE HAVE NO KNOWLEDGE EITHER OF ANY SUM QUOTED OR OF ANY OTHER PARTICULARS OF ANY OTHER TENDER FOR THIS CONTRACT BY ANY OTHER PARTY.

I/WE FURTHER CERTIFY THAT THE PRINCIPLES DESCRIBED ABOVE HAVE BEEN, OR WILL BE, BROUGHT TO THE ATTENTION OF ALL SUB-CONTRACTORS, SUPPLIERS AND ASSOCIATED COMPANIES PROVIDING SERVICES OR MATERIALS CONNECTED WITH THE TENDER AND ANY CONTRACT ENTERED INTO WITH SUCH SUB-CONTRACTORS, SUPPLIERS OR ASSOCIATED COMPANIES WILL BE MADE ON THE BASIS OF COMPLIANCE WITH THE ABOVE PRINCIPLES BY ALL PARTIES.

I/WE ACKNOWLEDGE THAT ANY BREACH OF THE FOREGOING PROVISIONS SHALL LEAD AUTOMATICALLY TO THIS TENDER BEING DISQUALIFIED AND MAY LEAD TO CRIMINAL OR CIVIL PROCEEDINGS. THE GOVERNMENT OF MONTSERRAT SHALL TREAT ANY TENDER RECEIVED IN CONFIDENCE BUT RESERVES THE RIGHT TO MAKE THE SAME AVAILABLE TO ANY OTHER FUNDING ORGANISATION OR STATUTORY REGULATORY AUTHORITY EITHER HAVING JURISDICTION OVER THE WORKS OR WHO MAY NOW OR AT ANY TIME IN THE FUTURE HAVE STATUTORY POWER TO REQUIRE DISCLOSURE OF THIS TENDER.

IN THIS CERTIFICATE, THE WORD 'PERSON' INCLUDES ANY PERSONS AND ANY BODY OR ASSOCIATION, INCORPORATED OR UNINCORPORATED; ANY AGREEMENT OR ARRANGEMENT INCLUDES ANY TRANSACTIONS, FORMAL OR INFORMAL AND WHETHER LEGALLY BINDING OR NOT; AND 'THE WORK' MEANS THE WORK IN RELATION TO WHICH THIS TENDER IS MADE.

SIGNATURE..... IN CAPACITY OF

DATE.....2022

DULY AUTHORISED TO SIGN TENDERS AND ACKNOWLEDGE THE CONTENTS OF THE ANTI-COLLUSION CERTIFICATE FOR AND ON BEHALF OF:

NAME OF FIRM.....

FULL POSTAL ADDRESS.....

TELEPHONE No..... FAX No

13.0 TENDER CHECKLIST

Project Title: **Consultancy for Public Sector Building Energy Audits and Solar PV Assessment**

Date advertised: Thursday, 11th August 20212

Clarifications Deadline: Tuesday, 23rd August 2022

Tender Deadline Date: Wednesday, 14th September 2022

Tender Deadline Time: 12:00 midday (Eastern Caribbean time) and 17:00 hrs UK time

Below are the following documents that should be provided for a contractor's tender to be valid. Bidders are asked to complete, supply and tick off the following information. Failure to provide any of the stated documents will result in the tender being considered non-compliant and rejected.

Completed and signed Form of Tender

The Form of Tender document shall be signed by a person legally authorized to bind the firm to a contract. The complete tender sum should be clearly written and included in the form of tender.

Tax Compliance Certificate (if bidder is a local company)

Completed and signed Respondent's Identification Details

Signed Anti-Collusion Statement

Methodology, and work plan in responding to the Terms of Reference

Completed Technical Questionnaire

Company profile which includes previous relevant work experience and qualifications (Curriculum Vitae) of key experts; Team Leader and Two (2) Energy Technicians etc.

Training Plan

.....
Signed on behalf of Contractor

.....
Date

14.0 APPENDIX A - FORM OF CONTRACT

FORM OF AGREEMENT ISLAND OF MONTSERRAT

This Agreement is made the..... day of..... between the **GOVERNMENT OF MONTSERRAT** having its headquarters at Government Headquarters, Brades, Montserrat acting herein and represented by **Mr. Colin Fergus** Permanent Secretary, Ministry of Communications Works and Labour and Energy (hereinafter referred to as “**GOM**”) of the one part and whose address is acting herein and represented by (hereinafter referred to as “**the Supplier**”) of the other part.

WHEREAS the Government of Montserrat is desirous of carrying out a Consultancy **for Public Sector Buildings Energy Audits and Solar PV assessment in Montserrat**, and WHEREAS the Supplier offered to perform this task as a contract price (**EC\$**.....), as full consideration for the Services performed by the Supplier under the terms of this Contract, the **GOM** will pay as per payment of fees and the proposed Payment Plan, against deliverables.

It is agreed as follows:

1. Deliverables:

The Supplier agrees to perform the following tasks as outlined in Terms of Reference and Key Deliverables within the context of the General Conditions of Contract.

2. Duration:

The duration of this assignment shall be a period of

3. Documents Forming this Agreement:

The following documents attached hereto shall be deemed to form an integral part of this Contract:

1. Appendix 1: Terms of Reference and Key Deliverables
2. Appendix 2: Key Deliverables
3. Appendix 3: Bidder's submission of Form of Tender
4. Appendix 4: Payment of Fees
5. Appendix 5: Proposed Payment Schedule
6. Appendix 6: Form of Contract
7. Appendix 7: The General Conditions of Contract

4. Ownership of Material:

Any studies, reports, designs or other material, graphic, software or otherwise, prepared by the Consultant for the Client under the Contract shall belong to and remain the property of the Client (Government of Montserrat). The Consultant may retain a copy of such documents and software.

IN WITNESS WHEREOF, the parties have executed this Contract on the dates set forth first above, with full knowledge of its content and significance and intending to be legally bound by terms hereof.

A. SUPPLIER

Name.....

Designation.....

Signature.....

Witness Name.....

Designation.....

Signature.....

B. GOM

Name.....

Designation.....

Signature.....

Witness Name.....

Designation.....

Signature.....

GENERAL CONDITION OF CONTRACT

This Agreement is made the (date)..... between the **GOVERNMENT OF MONTSERRAT** having its Headquarters at Government Headquarters, Brades, Montserrat acting herein and represented by **Mr. Colin Fergus** Permanent Secretary, Ministry of Communications Works and Labour (hereinafter referred to as "**GOM**") of the one part (**Supplier's Business**), whose address is (**Supplier's Business Address**) acting herein and represented by (**Supplier's Business Representative**) (hereinafter referred to as "**the Supplier**") of the other part.

The Employer is desirous that (**Service Supplier's Business**) provide **Public Sector Buildings Energy Audits and Solar PV assessment in Montserrat** as per terms of reference outlined in Tender Submission and has been accepted by the supplier for the sum of Contract **SUM** (\$ECXXX) being the amount to provide **Public Sector Buildings Energy Audits and Solar PV assessment in Montserrat** in accordance with the tender submission which comprised the contract document.

1. INTERPRETATION

1.1. In these conditions: -

The Contract means the agreement concluded between the **GOM** and the Supplier (**Service Supplier's Business**), including all specifications which are described and attached hereto to include the tender instructions, scope of works and other documents which may be incorporated or referred to herein;

The contracting authority means the Government of Montserrat **GOM**.

The Supplier" means the company/ companies/ individuals that have responsibility for carrying out the requirements of the contract.

The Contract Price" means the gross price to be paid by **GOM** and the method of payment of the Contract Price shall be agreed between the parties.

The Specifications (Terms of Reference) means the GOM's requirements for the provision of Public Sector Buildings Energy Audits and Solar PV assessment as provided in bid document, details of which have been provided in this tender document.

2. VARIATIONS OF CONDITIONS

The delivery of works outlined in the terms of reference shall be carried out in accordance with these Conditions and requirements and no amendment or variation either to the terms and conditions or to the requirements shall be made unless agreed in writing between the parties and incorporated into this agreement.

3. NON-DELIVERY

Without prejudice to any other right or remedy, should the Supplier not deliver the Services or any portion thereof within the time or times specified in the Contract, except in cases of force majeure and subject always to the receipt of written notice within five (5) days of the force majeure event relied on or if the Services are delayed due to events outside of the Supplier's control, in which case the Supplier shall be entitled to a fair and reasonable time for such delay, then:

- 3.1 The **GOM** shall be at liberty to determine the Contract and to procure services of the same or similar description from another Supplier to make good such default; and,
- 3.2 The **GOM** shall recover from the Supplier any sum or sums paid to the Supplier in respect of the services. Also, the **GOM** shall be able to recover from the supplier any increased costs resulting from obtaining supplies from an alternative supplier.

4. **PAYMENT**

- 4.1 As full consideration for the Services performed by the Supplier under the terms of this Contract, the **GOM** will pay the fees as outlined in Schedule 2 within 21 days of receipt of an invoice, payable against original invoices delivered to the **GOM** by the Supplier, provided that **GOM** give notice in writing of its intention not to pay such fee and provide the relevant reason where:
 - a. The Supplier has failed to carry out services, or has inadequately carried out services required by this Contract to be carried out and has not remedied such failure or deficiency within a reasonable time;
 - b. The Supplier, by act or omission has caused damage to personnel or property of the **GOM** or any third party;
 - c. There is a breach of any other provision of this Contract; and upon giving such notice the **GOM** may withhold payment accordingly.
- 4.1 **GOM**, whenever under the Contract any sum of money shall be recoverable from or payable by the Supplier, the same may be deducted from any sum then due or which at any time thereafter may become due to the Supplier under the Contract as a debt, providing that such sum is agreed by the parties as recoverable by GOM or has been fully ascertained and substantiated.
- 4.2 Payment Schedule is in accordance with Deliverables and Payment Schedule.
- 4.3 The Contractor and GOM agree that they will each have the respective obligations under this agreement as outlined in Schedule 3.

5. **INDEMNITY AND INSURANCE**

- 5.1 Supplier shall be liable for and shall indemnify the **GOM** against any liability, loss, costs, expenses, claims or proceedings whatsoever arising under any statute or common law in respect of: -
 - 5.1.1 Any loss of or damage to property (whether real or personal) caused by the Supplier, its servants or agents; and
 - 5.1.2 Any injury to any person including injury resulting in death, in consequence of or in any way arising out of any negligent act or omission which may arise in the performance of the Contract by or on behalf of the Supplier except insofar as such loss, damage or injury shall have been caused by negligence on the part of the **GOM**, its employees, servants or agents.

- 5.2 The Supplier shall only be liable to pay compensation to the Purchaser under or in connection with this Contract if a breach of Clause 3 is established against the Supplier. Notwithstanding any other term to the contrary in this Contract or any related document and whether the cause of action for any claim arises under or in connection with this Contract in contract or tort, in negligence or for breach of statutory duty or otherwise, in relation to any and all causes of action as aforesaid the total liability of the Supplier in the aggregate for all claims shall be limited to 1,000,000.00 Eastern Caribbean Dollars.
- 5.3 Neither party shall be liable to the other for any indirect, special or consequential loss (including but not limited to loss of profit whether direct or indirect, loss of production, loss of contracts, loss of use, loss of business, and loss of business opportunity.
- 5.4 Further and without prejudice to the aforesaid limit of liability and such liability of the Contractor/Consultant/Supplier for the loss or damage in respect of any claim or claims shall be limited to such sum or sums as it would be just and equitable for the Contractor/Consultant/Supplier to pay having regard to the Contractor's /Consultant's responsibility for the same and on the basis that:
- a) all other parties appointed or to be appointed by the Purchaser to perform related services in connection with the Project shall be deemed to have provided undertakings on terms no less onerous than this Contract and shall be deemed to have paid to the Purchaser such contribution as it would be just and equitable for them to pay having regard to their responsibility for the loss or damage; and
 - b) it shall be deemed that all such other parties have not limited or excluded their liability to the Purchaser for the loss or damage in any way which may be prejudicial to the Contractor's/Consultant's liability under this clause

6. INSURANCE

- 6.1 The Supplier shall insure against its full liability under this Contract.
- 6.2 The Supplier shall produce to **GOM**, upon request, documentary evidence that insurance is properly maintained.

7. ASSIGNMENT

- 7.1 The **GOM** shall be entitled to assign the benefit of this Contract or any part thereof and shall give written notice of any assignment to the Supplier.
- 7.2 The Supplier shall not: -
- 7.2.1 Assign the Contract or any part thereof or the benefit or interest of the Contract without the prior written consent of the **GOM**; or
 - 7.2.2 Subcontract any provision of the Contract or any part thereof to any person without the previous written consent of the **GOM, such consent shall not be unreasonably withheld or delayed**, which if given shall not relieve the Supplier from any liability or obligation under the Contract and the Supplier shall be responsible for the acts, defaults, or neglect of any sub-Supplier or his agents or employees in all respects as if it were the acts, defaults or neglect of the Supplier or its agents or employees.

8. CONFIDENTIALITY

- 8.1 All information, requirements, documents and other data which the **GOM** may have imparted and may from time to time impart to the Supplier relating to its business, employees, customers, prices, requirements, or any computer system (including hardware and software or maintenance thereof) and including any technical specifications is proprietary and confidential.
- 8.2 The Supplier hereby agrees that it shall use such confidential information and all other data solely for the purposes of this Contract and that it shall not at any time during or any time after the completion, expiry or termination of this Contract, disclose the same whether directly or indirectly to any third party without the **GOM's** prior written consent.
- 8.3 The obligations set forth in Clauses 8 and 16 shall expire two (2) years after the termination of the Contract.

9. BRIBERY AND CORRUPTION

Either party shall be entitled to determine the Contract and to recover from the other party the amount of any loss resulting from such action if:-

- 9.1 Any party that has offered or given or agreed to give to any person any gift or consideration of any kind as inducement or reward for doing or forbearing to do or for having done or forborne to do any action in relation to the Contract or any other contract with the other party; or
- 9.2 The like acts shall have been done by any person employed by the Parties or acting on its behalf (whether with or without the knowledge of the Party); or
- 9.3 In relation to any contract with the **GOM** the Supplier or person employed by it or acting on its behalf shall:-
- 9.3.1 Have committed an offence under the Integrity in Public Office Act No. 2 of 2010 or
- 9.3.2 Have given any fee or reward, the receipt of which is an offence, under the relevant laws.
- 9.4 In the performance of their obligations under or in connection with this Contract the parties, their agents and employees shall comply with all applicable laws, rules and regulations including and not limited to the Bribery Act 2010 and where appropriate, the OECD Convention on Combating Bribery of Foreign Public Officials in International Business Transactions.

10. TERMINATION

- 10.1 The **GOM** may terminate this Contract in any of the circumstances set out in 10.2 below by giving to the Supplier notice in writing where the Supplier; -
- 10.1.1 Commits a material breach of any of its obligations under this Contract; and despite notice of such breach in writing by the Purchaser to the Supplier, the Supplier fails to remedy such breach within 14 days of the notice then the Purchaser may terminate the Contract forthwith.
- 10.1.2 Becomes bankrupt or makes a composition or arrangement with its creditors or has a proposal in respect of its company or partnership for the voluntary

arrangement for the composition of debts or scheme or arrangement approved in accordance with the Companies Act or the Bankruptcy Act;

10.1.3 Has a winding-up order made or (except for the purposes of amalgamation or reconstruction/ a resolution for voluntary winding-up passed;

10.1.4 Has a provisional liquidator, receiver or manager of its business or undertaking duly appointed;

10.1.5 Has an administrative receiver appointed;

10.1.6 Has possession taken by or on behalf of the holders of any debentures secured by a floating charge of any property comprised in or subject to the floating greater than US\$25,000.00.

10.1.7 Is in circumstances which entitle a court or creditor to appoint or have appointed a receiver, a manager or administrative receiver or which entitle a court to make a winding-up order; then in any such circumstances the **GOM** may without prejudice to any accrued rights or remedies under this Contract, terminate the Contract by giving notice in writing.

10.2 If the Contract is terminated as provided in this condition then the **GOM** shall:-

10.2.1 Cease to be under any obligation to make further payment until the costs or loss resulting from or arising out of the termination of this Contract shall have been calculated, and shall make such payment only in accordance with a court order or pursuant to the applicable law;

10.2.2 Be entitled to repossess any of its Equipment (if any) in the possession of the Supplier;

10.2.3 Be entitled to deduct any losses to the **GOM** resulting from or arising out of the termination of this Contract (from any sum or sums which would but for the termination of the contract as aforesaid have been due from the **GOM** to the Supplier as a debt). Such loss shall include the reasonable cost to the **GOM** of the time spent by the **GOM** in terminating of the Contract as aforesaid have been due to the Supplier.

11. WAIVER

11.1 The failure by either party to enforce at any time or for any period any one or more of the terms or conditions of this Contract shall not be a waiver of them or of the right at any time subsequently to enforce all terms and conditions of this Contract. No waiver of any default or non-performance by any party shall be considered a waiver of any subsequent default or non-performance.

12. COMPLETE CONTRACT

12.1 This Contract supersedes any prior Contract between the parties whether written or oral relating to the subject matter hereof, but without prejudice to any rights which have already accrued to either of the parties.

13. GOVERNING LAW

13.1 This Contract shall be governed by the laws of Montserrat in every particular and shall be deemed to be made in Montserrat.

14. FORCE MAJEURE

Both parties shall be released from their respective obligations in the event of national emergency, natural disaster, war, prohibitive governmental regulation or if any other cause beyond the reasonable control of the parties or either of them renders the performance of this Contract impossible whereupon all money due under this Contract shall be paid immediately.

15. NOTICES

15.1 Any notice required to be served under this Contract shall be in writing and may be served by electronic mail to the correct address, facsimile transmission to the correct number, post or hand delivery to the last known business address of the party upon whom it is being served. Notice shall be deemed to have been effected within 24 hours of the date of sending of the notice when sent by electronic mail or facsimile transmission, within 72 hours of the date of posting of the notice when sent by post and upon delivery when hand delivered.

15.2 A notice shall be delivered as follows:

A. If to the Supplier, to:

Name:
Designation:
Address:
.....
Tel:
Fax:
Email:

B. If to the **GOM**, to:

Mr. Colin Fergus
Permanent Secretary
Ministry of Communications, Works, Labour & Energy
Brades
Montserrat

Tel: (664) 491-2521 or 2522
Fax: (664) 491-6659
Email: mcw@gov.ms
Email: cfergus@gov.ms

16. CONFIDENTIALITY

16.1 The Supplier shall not at any time during or after the term of this Contract divulge or allow to be divulged to any person any information which comes into its possession by virtue of its performance of this Contract, which relates to the business and affairs of the **GOM** except upon authorization by the **GOM**. The Supplier shall not seek to acquire any such information outside of the performance of its duties under this Contract.

17. MEDIATION AND ARBITRATION

- 17.1 If a dispute arises under this Contract, the parties agree to first try to resolve the dispute through mutual agreement within 14 days. If unsuccessful, then the dispute shall be settled with the help of a mutually agreed-upon mediator in Montserrat. The parties shall share any costs and fees other than attorney fees associated with the mediation equally.