**CONTRACT NO. : PF/2981/2018**

**ATTACHMENT 2 – Scoping Commercial Opportunities for Green Finance in Mexico.**

1. Introduction Page 1
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5. **Introduction**
6. The tender process will be conducted to ensure that the tenders are evaluated fairly to identify the Most Economically Advantageous Tender (MEAT) from the point of view of the purchasing Authority.
7. Account will be taken of any factor emerging from the tender process which impacts a Tenderer’s suitability, relating to information provided by the Tenderer within the Qualification criteria, in particular any additional information which comes to light in respect of its financial standing.
8. Your response to our requirement (as detailed in Attachment 4) will be evaluated under the following headings based on an 75:25 Quality-Technical / Price split. Responses to all of the questions below should be submitted to ukinmexicoccep@fco.gov.uk
9. No importance should be attached to the order in which these criteria are listed. Any tender that is not compliant with the Conditions of Contract may be rejected.
10. Bidders must be explicit and comprehensive in their responses to this ITT. Bidders are advised neither to make assumptions about their past or current supplier relationships with the Authority nor to assume that such prior business relationships will be taken into account in the evaluation procedure.
11. All questions MUST BE answered in English.
12. **General treatment of responses: (Award criteria and weightings)**

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| **1.1 Technical-Methodology (Questions 1.1.1 – 1.1.4)**  | **Criteria Weighting****%** |
| * + 1. **Proposed Methodology and Project Management**

Please provide:(i) Details of the methodology and approaches proposed to meet the requirements of this contract, and how you propose to plan, manage and deliver this project within the limited timescales. *Maximum pages = 2*(ii) A one-page stakeholder engagement plan, clearly indicating those stakeholders with which the bidder has already engaged in the past. *Maximum pages = 1*(iii) A project plan referring to Terms of Reference including schedule of activities and timescales, detailing milestones, deliverables. This should include a gantt chart as a one- page annex.*Maximum pages =1 plus annex* | 30 |
| **1.1.2 Experience** (i) Please present a summary of similar work where you have conducted research, analysis and developed reports in the areas of work relevant to the outputs of this TOR. *Maximum pages = 2* | 30 |
| **1.1.3 Risk Management** (i) Please provide a risk management strategy. Identify any key risks (internal and external) to the project and explain how they will be mitigated. Please explain who is responsible for managing each risk and escalation points. Indicate how the project will be monitored to ensure it is delivered in terms of quality, timelines and cost. *Maximum pages = 1* | 20 |
| **1.1.4 Project Team / Resource Plan** (i) Please provide details of the team (including any sub-contractors, where appropriate) and key personnel who will be involved in delivering the project, and the proportion of your and their time which you propose to dedicate to the project. The plan should indicate each person’s role in the project, suitability, and value added. It should also describe your proposed operational management for the service and provide a description of the key managerial roles and responsibilities, reporting relationships and accountabilities.The British Embassy in Mexico reserves the right to request interviews, request alternatives and provide final approval of suggested team members before commencement of the project.Maximum pages = 1 + Organogram + 1-page *CVs of key team members* | 20 |
| \*Equivalent to 70% of the total weighting  | 100% |
| **GRAND TOTAL– Quality/Technical** | **75%** |

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| **1.2 Evaluation Criteria – Pricing & Commercial**  | **Criteria Weighting****%** |
| **1.2.1** Competitiveness of fee rates and overall project cost in relation to the market to demonstrate value for money. (Attachment 5 Schedule of Prices & Rates, prices should be shown in GBP including all applicable taxes & VAT)This MUST be included in the format of the table included in ATT5 – Schedule of Prices & Rates.Failure to provide a pricing submission in the format requested may invalidate your tender proposal. Your cost proposal will be taken as your **Best and Final Offer**. | 100 |
| \*Equivalent to 30% of the total weighting | **100%** |
| **GRAND TOTAL – Pricing & Commercial**  | **25%**  |

1. **Qualification Question – Assessment Criteria**

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| **1.1** | **Supplier Tips For Completing Your Response** |
| 1.1.1 | Please download the Attachment 7 – Supplier Tips for Completing Response for the tender.  |

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| **1.2** | **Company Information** |
| 1.2.1 | Full name of organisation tendering (or of organisation acting as lead contact where a consortium bid is being submitted). | **Mandatory** |
| 1.2.2 | Registered office address. |
| 1.2.3 | VAT Registration number or local equivalent (upload a copy of register) |
| 1.2.4 | Name of immediate parent company. |
| 1.2.5 | Name of ultimate parent company. |
| 1.2.6 | Type of organisation:i) public limited companyii) limited companyiii) limited liability partnershipiv) other partnershipv) sole tradervi) third sectorvii) other (please specify your trading status). |
| 1.2.7 | If (i), (ii), (iii) or (iv) apply, please provide Companies House Registration number or local equivalent (upload a copy of register). If Other, please specify. |
| 1.2.8 | Name, Address, Post Code, Country, Phone, Mobile, Email. |
| 1.2.9 | Provide brief history incl. details of parent and associated companies and any changes of ownership over the last 5 years including details of significant pending developments, changes in financial structure or ownership, buy-outs and closures which are currently in the public domain. |
| 1.2.10 | Give the names and responsibilities of the Executive Directors and Partners of your organisation. |
| 1.2.11 | Are you currently supplying goods and/or services to the Authority? |
| 1.2.12 | If yes in 1.2.11, please provide details. |
| 1.2.13 | Are there any conflicts of interest between your organisation and the Authority or any advisor to the Authority? |
| 1.2.14 | If yes in 1.2.13, please provide details. |
| 1.2.15 | State if your Organisation is in possession of all relevant licences, required by law, to enable you to operate/carry out your business. |
| 1.2.16 | Is it a legal requirement in the State where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement? If yes, please provide details of what is required and confirm that you have complied with this and upload a copy of licenses. |
| 1.2.17 | Is your Organisation affiliated to a relevant registered professional body? Is your business registered with the appropriate trade or professional register(s) in the EU member state where it is established (as set out in Annexes IX A-C of Directive 2004/18/EC) under the conditions laid down by that member state) or local equivalent, for Companies based outside of the EU? |
| 1.2.18 | Are there any court actions and/or industrial tribunal hearings outstanding against your Organisation? |
| 1.2.19 | If yes in 1.2.18, please provide details. |
| 1.2.20 | Has your organisation been involved in any court action and/or industrial tribunals over the last 3 years? |
| 1.2.21 | If yes in 1.2.20, please provide details. |
| 1.2.22 | Provide copies of Certificates of Incorporation (where appropriate) and any changes of name, registered office and principal place of business. |
| 1.2.23 | Provide a one page chart illustrating the ownership structure of your organisation including relations to any parent or other group or holding companies. |

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| **1.3** | **Consortia and Sub-Contracting** |
| 1.3.1 | Is your company affiliated or associated with any other company capable of tendering for these Services?  | **Mandatory** |
| 1.3.2 | If Yes, please provide details. |
| 1.3.3 | What (if any) aspects of your solution to our requirements would you be planning to sub-contract, and in which case please confirm under what country of law would these sub-contracts be governed, e.g. English or otherwise. |
| 1.3.4 | Consortia and Sub-Contracting: Please state whether your organisation is bidding:i) To provide services in-houseii) As Prime Contractor using 3rd partiesiii) Potential Provider in a consortium |
| 1.3.5 | If your answer is (ii) or (iii) please indicate (by inserting the relevant company/organisation name) the composition of the supply chain, indicating which member of the supply chain (which may include the Potential Provider solely or together with other providers) will be responsible for the elements of the requirement. |

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| **1.4** | **Financial Accounts** |
| 1.4.1 | Please upload a copy of your organisation’s Audited financial accounts for the last 2 years of trading. As a minimum, this must include a profit & Loss Account and Balance Sheet. This will be “Confidential” and for the exclusive purpose of this tender. | **Mandatory** |

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| **1.5** | **Insurance** |
| 1.5.1 | Does your organisation hold Employer's Liability Insurance or local equivalent? If yes, upload a copy. | **Mandatory** |
| 1.5.2 | Does your organisation hold Public Liability Insurance or local equivalent? If yes, upload a copy. |
| 1.5.3 | Does your organisation hold Professional Indemnity Insurance or local equivalent? If yes, upload a copy. |
| 1.5.4 | It is a Condition of this procurement that your organisation will hold adequate and appropriate insurance cover as required by local statute in the state where you are established and to deliver the services. Please confirm this is the case, provide details and upload evidence. |

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| **1.6** | **Technical and Professional References** |
| 1.6.1 | Please upload two letters of reference from previous delivered projects or contracts from either or both; the public or private sector; that are relevant to the Authority’s requirement performed during the past three years. (The customer contact should be prepared to speak to the purchasing organisation to confirm the accuracy of the information provided below if we wish to contact them). Where the Potential Provider is a special purpose vehicle and not intending to be the main provider of the goods or services, the information requested should be provided in respect of the principal intended provider of the goods or services.If, the two letters of reference cannot be received in time; at a minimum you must provide contact information (name, telephone number, email address, name of company, position and name of project). | **Mandatory** |

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| **1.7** | **Acceptance** |
| 1.7.1 | Please **download** the attached Duty of Care (ATT9), **sign** and **upload**. |  |
| 1.7.2 | Do you agree that the Supplier is responsible for the safety and well-being of their Personnel and Third Parties affected by their activities under this Contract, including appropriate security arrangements. They will also be responsible for the provision of suitable security arrangements for their domestic and business property. |  |
| 1.7.3 | Do you agree that your company is responsible for ensuring appropriate safety and security briefings for all of their Personnel working under this Contract and ensuring that their Personnel register and receive briefing as outlined above. Travel advice is also available on the FCO website and the implementing agency must ensure they (and their Personnel) are up to date with the latest position. Please upload Health & Safety programs.  |  |
| 1.7.4 | Please confirm that, if selected, your company will agree that the Contract (ATT 3 Proposed Contract Documents) with the FCO will be under English Law and subject to the exclusive jurisdiction of the English Courts or a version of the contract which conforms to the law in the State where you are established. | **Mandatory** |
| 1.7.5 | The Authority pays into its Contractors by bank transfer. Bank transfer is a payment instruction from the Authority to its bank or payment service provider to transfer an amount of money to the Contractors bank account. You may be asked to provide a Parent Company Guarantee or a Bank Guarantee. Please confirm that you agree to be paid by bank transfer. |
| 1.7.6 | I declare that to the best of my knowledge the answers submitted in this questionnaire are correct. I understand that the information will be used in the process to assess my organisation’s suitability to be invited to tender for the Authority’s requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may reject this questionnaire if there is a failure to answer all relevant questions fully or if I provide false/misleading information. |
| 1.7.7 | Declaration by tenderer:1. I have examined the documents under cover of your invitation to tender letter and have taken account of all subsequent amendments.2. I hereby offer to enter into a contract with the Secretary of State for Foreign & Commonwealth Affairs, as represented by the Foreign & Commonwealth Office, acting as part of the Crown, for the Provision of SCOPING COMMERCIAL OPPORTUNITIES FOR GREEN FINANCE IN MEXICO for the British Embassy in Mexico.3. I warrant that I have all the requisite corporate authority to sign this tender.4. If requested, we shall provide a Parent Company Guarantee, in the form set out in the tender documentation.5. I understand that the Authority is not bound to accept the lowest or any tender. I also understand the Authority has the right to accept only part of a tender unless I have expressly stipulated otherwise.6. This tender shall remain open for acceptance by the Authority for a period of 3 months after the due date for return specified in your Invitation to Tender.7. We acknowledge that the information set out in the invitation to tender is confidential to the Authority and contains documentation which is subject to Crown copyright. We undertake not to copy or disseminate this information or documentation and if required by the Authority to return all such information and documentation in its possession to the Authority or else certify its destruction.8. I agree that the Authority may disclose my information/documentation submitted during this procurement more widely within Government for the purpose of ensuring effective cross-Government procurement. |

1. **Score Key Assessment**

All tenders will be scored as above in accordance with the marking system set out below:

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| **Score:** **Price / Commercial** | **Score Key Assessment** | **Score:****Quality / Technical** | **Interpretation** |
| Most financially attractive to Authority | **4** | **Excellent** | Satisfies the requirement **with additional benefits**. Good demonstration by the Tenderer of the understanding and evidence to deliver a solution for the required supplies/services. Response identifies tailoring, proactive response, and **factors that will offer potential added value**. |
| Score awarded on inverse percentage difference from most financially attractive offer  | **3** | **Good** | **Satisfies the requirement**. Demonstration by the Tenderer of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. |
| **2** | **Minor Reservations** | Satisfies most requirements with minor reservations. Some minor reservations of the Tenderer's understanding and methodology, and/or staffing and experience, with limited supporting evidence or information. |
| **1** | **Serious Reservations/Non compliant** | Major reservations of the Tenderer's understanding and proposed methodology, with lack of information and little or no evidence to support the response, with minimal tailoring. |
| **0** | **Unacceptable/ Non-compliant** | Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Tenderer has the understanding or suitable methodology, with little or no evidence to support the response. |