SECTION A – COVER PAGE

See SF-33

SECTION B – PRICES

JAMES ZADROGA 9/11 VICTIMS HEALTH AND COMPENSATION ACT OF 2010 NOTICE: UNLESS A WAIVER OR EXCEPTION APPLIES, PAYMENTS SUBSEQUENT TO THIS PROCUREMENT ARE SUBJECT TO AN EXCISE TAX OF 2% PERSUANT TO 26 U.S.C. 5000C.

B.1 GROUP LIFE INSURANCE SERVICES

The Contractor shall provide Group life Insurance services described herein to employees of the Government of the United States of America (USG) in the Embassy and Consulates in Mexico and their eligible dependents as described in Section C. This insurance shall be provided in accordance with Section C and the Exhibits in Section J.

B.1.1 Riders

The following employees are included under this contract only as a rider. See Section G for billing procedures. Note that USG is not responsible, nor liable, for any riders.

B.1.1.1 Official Residence Expense (ORE)

Official Residence Expense (ORE) Staff are included under this contract solely as a rider. The Contractor shall issue a separate policy specifically for ORE coverage and submit a separate invoice to the U.S. Embassy in Mexico for payment of the premiums associated with this coverage. Premiums shall be charged at the rates specified below.

B.2 PRICES

B.2.1 Type Of Contract

This is a Fixed-Price, Indefinite-Quantity, Definite-Delivery, Requirements type contract with Economic Price Adjustment, providing for upward and downward revision of the stated contract price upon the occurrence of specified contingencies. Neither the Contractor, nor the Government may benefit from the Economic Price Adjustments. The Government anticipates the need for recurring requirements but cannot predetermine the precise quantities of services needed for a definite period. This contract type provides for filling all actual requirements for insurance services during a specified contract period, with deliveries or performance to be scheduled by placing multiple fixed-price variable quantity task orders with the contractor. Orders under this contract may be funded fully or incrementally throughout the period of performance specified in the contract term, option periods and Task Orders.

B.2.2 Currency

B.2.2.1 Offers and Payment in U.S. Dollars

U.S. firms are eligible to be paid in U.S. dollars. U.S. firms desiring to be paid in U.S. dollars should submit their offer in U.S. dollars. A U.S. firm is defined as a company which operates

as a corporation incorporated under the laws of a state within the United States and its Territories. Local companies are eligible to be paid in U.S. dollars provided that such company has a bank account in U.S. dollars at a Local Bank.

B.2.2.2 Offers and Payment in Pesos, Mexican currency

Any firm that is not a U.S. firm is a foreign firm. Any local or foreign firm that does not meet the definition of a U.S. firm shall submit its prices and receive payment in local currency unless the foreign or local firm has a U.S. dollar bank account in Mexico.

B.2.3 Value Added Tax

Value Added Tax (VAT) is not applicable to either U.S. firms or Local Companies; therefore, it shall not be included in U.S. firms' rates or Invoices.

B.2.4 GROUP LIFE INSURANCE RATES

As per paragraph B.2.2, above, prices are shown in *[insert currency: _____]*

*** NOTE TO OFFERORS: This solicitation requires the submission of prices under two distinct pricing methodologies: B.2.5 Salary-Based Rates and B.2.6 Age-Based Rates. Offerors shall propose complete and fully supported pricing for both methodologies using the Pricing Schedules contained in Section B of this RFP and in strict accordance with the Solicitation Instructions set forth in Section L. The U.S. Government will evaluate both pricing methodologies in accordance with the Evaluation Criteria in Section M and will determine which methodology, and corresponding offer, represents the best overall value to the U.S. Government.**

B.2.5 Salary-Based Rates

The fixed prices/premium rates for the Group life insurance services as specified in Section C are as follows:

B.2.5.1 Base Year

The fixed prices/premium rates per one thousand of salary to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.5.1.1 Bi-Weekly Rates per Regular Employee

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[a] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
0001	a.	Basic Life	31,168	$	$
	b.	Accidental Death	31,168	$	$
	c.	Total Permanent Disability	31,168	$	$

[a] *Estimated Payroll does not include any Riders (B.1.1)*

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[a] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
				Subtotal (a + b + c):	$
				Estimated Total for Base Year (Subtotal x26) for Regular Employees:	$

B.2.5.1.2 Bi-Weekly Rates per Bodyguard

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[b] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
0002	a.	Basic Life	229	$	$
	b.	Accidental Death	229	$	$
	c.	Total Permanent Disability	229	$	$
				Subtotal (a + b + c):	$
				Estimated Total for Base Year (Subtotal x26) for Bodyguards:	$

B.2.5.1.3 Base Year Total

Estimated Total Price for Base Year (Subtotal x26) for Regular Employees:	$
Estimated Total Price for Base Year (Subtotal x26) for Bodyguards:	$
Estimated Base Year Total	**$**

B.2.5.2 First Option Year

The fixed prices/premium rates per one thousand of salary to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.5.2.1 Bi-Weekly Rates per Regular Employee

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[c] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
1001	a.	Basic Life	32,414	$	$
	b.	Accidental Death	32,414	$	$
	c.	Total Permanent Disability	32,414	$	$
				Subtotal (a + b + c):	$
				Estimated Total for First Option Year (Subtotal x26) for Regular Employees:	$

[b] *Estimated Payroll does not include any Riders (B.1.1)*
[c] *Estimated Payroll does not include any Riders (B.1.1)*

B.2.5.2.2 Bi-Weekly Rates per Bodyguard

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[d] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
1002	a.	Basic Life	238	$	$
	b.	Accidental Death	238	$	$
	c.	Total Permanent Disability	238	$	$
				Subtotal (a + b + c):	$
Estimated Total for First Option Year (Subtotal x26) for Bodyguards:					$

B.2.5.2.3 First Option Year Total

Estimated Total Price for First Option Year (Subtotal x26) for Regular Employees:	$
Estimated Total Price for First Option Year (Subtotal x26) for Bodyguards:	$
Estimated First Option Year Total	**$**

B.2.5.3 Second Option Year

The fixed prices/premium rates per one thousand of salary to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.5.3.1 Bi-Weekly Rates per Regular Employee

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[e] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
2001	a.	Basic Life	33,711	$	$
	b.	Accidental Death	33,711	$	$
	c.	Total Permanent Disability	33,711	$	$
				Subtotal (a + b + c):	$
Estimated Total for Second Option Year (Subtotal x26) for Regular Employees:					$

B.2.5.3.2 Bi-Weekly Rates per Bodyguard

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[f] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
2002	a.	Basic Life	247	$	$
	b.	Accidental Death	247	$	$
	c.	Total Permanent Disability	247	$	$

[d] *Estimated Payroll does not include any Riders (B.1.1)*
[e] *Estimated Payroll does not include any Riders (B.1.1)*
[f] *Estimated Payroll does not include any Riders (B.1.1)*

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[f] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
				Subtotal (a + b + c):	$
Estimated Total for Second Option Year (Subtotal x26) for Bodyguards:					$

B.2.5.3.3 Second Option Year Total

Estimated Total Price for Second Option Year (Subtotal x26) for Regular Employees:	$
Estimated Total Price for Second Option Year (Subtotal x26) for Bodyguards:	$
Estimated Second Option Year Total	**$**

B.2.5.4 Third Option Year

The fixed prices/premium rates per one thousand of salary to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.5.4.1 Bi-Weekly Rates per Regular Employee

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[g] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
3001	a.	Basic Life	35,059	$	$
	b.	Accidental Death	35,059	$	$
	c.	Total Permanent Disability	35,059	$	$
				Subtotal (a + b + c):	$
Estimated Total for Third Option Year (Subtotal x26) for Regular Employees:					$

B.2.5.4.2 Bi-Weekly Rates per Bodyguard

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[h] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
3002	a.	Basic Life	257	$	$
	b.	Accidental Death	257	$	$
	c.	Total Permanent Disability	257	$	$
				Subtotal (a + b + c):	$
Estimated Total for Third Option Year (Subtotal x26) for Bodyguards:					$

[g] *Estimated Payroll does not include any Riders (B.1.1)*
[h] *Estimated Payroll does not include any Riders (B.1.1)*

B.2.5.4.3 Third Option Year Total

Estimated Total Price for Third Option Year (Subtotal x26) for Regular Employees:	$
Estimated Total Price for Third Option Year (Subtotal x26) for Bodyguards:	$
Estimated Third Option Year Total	**$**

B.2.5.5 Fourth Option Year

The fixed prices/premium rates per one thousand of salary to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.5.5.1 Bi-Weekly Rates per Regular Employee

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[i] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
4001	a.	Basic Life	36,462	$	$
	b.	Accidental Death	36,462	$	$
	c.	Total Permanent Disability	36,462	$	$
				Subtotal (a + b + c):	$
Estimated Total for Fourth Option Year (Subtotal x26) for Regular Employees:					$

B.2.5.5.2 Bi-Weekly Rates per Bodyguard

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[j] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
4002	a.	Basic Life	268	$	$
	b.	Accidental Death	268	$	$
	c.	Total Permanent Disability	268	$	$
				Subtotal (a + b + c):	$
Estimated Total for Fourth Option Year (Subtotal x26) for Bodyguards:					$

B.2.5.5.3 Fourth Option Year Total

Estimated Total Price for Fourth Option Year (Subtotal x26) for Regular Employees:	$
Estimated Total Price for Fourth Option Year (Subtotal x26) for Bodyguards:	$
Estimated Fourth Option Year Total	**$**

[i] *Estimated Payroll does not include any Riders (B.1.1)*
[j] *Estimated Payroll does not include any Riders (B.1.1)*

B.2.5.6 52.217-8 Extension

The fixed prices/premium rates per one thousand of salary to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.5.6.1 Bi-Weekly Rates per Regular Employee

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[k] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
5001	a.	Basic Life	37,920	$	$
	b.	Accidental Death	37,920	$	$
	c.	Total Permanent Disability	37,920	$	$
				Subtotal (a + b + c):	$
Estimated Total for 52.217-8 Extension (Subtotal x13) for Regular Employees:					$

B.2.5.6.2 Bi-Weekly Rates per Bodyguard

CLIN	SUBCLIN	Type of Insurance	Estimated Payroll[l] (Bi-weekly in Thousands)	Premium (per 1,000 of salary)	Estimated Bi-weekly Total
5002	a.	Basic Life	278	$	$
	b.	Accidental Death	278	$	$
	c.	Total Permanent Disability	278	$	$
				Subtotal (a + b + c):	$
Estimated Total for 52.217-8 Extension (Subtotal x13) for Bodyguards:					$

B.2.5.6.3 52.217-8 Extension Total

Estimated Total Price for 52.217-8 Extension (Subtotal x13)for Regular Employees:	$
Estimated Total Price for 52.217-8 Extension (Subtotal x13) for Bodyguards:	$
Estimated 52.217-8 Extension Total	**$**

[k] *Estimated Payroll does not include any Riders (B.1.1)*
[l] *Estimated Payroll does not include any Riders (B.1.1)*

B.2.6 ***Age-Based Prices***

The fixed prices/premium rates for the Group life insurance services as specified in Section C are as follows:

B.2.6.1 *Base Year*

The fixed monthly prices/premium rates per Age-Group to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.6.1.1 Monthly Rates per Regular Employee

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[m]	Monthly Rate	Annual Rate
0001	18-30	a.	Basic Life	89	$	$
		b.	Accidental Death	89	$	$
		c.	Total Permanent Disability	89	$	$
0002	31-45	a.	Basic Life	823	$	$
		b.	Accidental Death	823	$	$
		c.	Total Permanent Disability	823	$	$
0003	46-60	a.	Basic Life	715	$	$
		b.	Accidental Death	715	$	$
		c.	Total Permanent Disability	715	$	$
0004	61-70	a.	Basic Life	67	$	$
		b.	Accidental Death	67	$	$
		c.	Total Permanent Disability	67	$	$
0005	+71	a.	Basic Life	3	$	$
		b.	Accidental Death	3	$	$
		c.	Total Permanent Disability	3	$	$
Estimated Base Year Total Price for Regular Employees						$

B.2.6.1.2 Bi-Weekly Rates per Bodyguard

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[n]	Monthly Rate	Annual Rate
0006	18-30	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
0007	31-45	a.	Basic Life	16	$	$
		b.	Accidental Death	16	$	$
		c.	Total Permanent Disability	16	$	$
0008	46-60	a.	Basic Life	17	$	$
		b.	Accidental Death	17	$	$

[m] *Estimated Quantity does not include any Riders (B.1.1)*
[n] *Estimated Quantity does not include any Riders (B.1.1)*

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[n]	Monthly Rate	Annual Rate
		c.	Total Permanent Disability	17	$	$
0009	61-70	a.	Basic Life	1	$	$
		b.	Accidental Death	1	$	$
		c.	Total Permanent Disability	1	$	$
0010	+71	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
					Estimated Base Year Total Price for Bodyguards	**$**

B.2.6.1.3 Base Year Total

Estimated Base Year Total Price for Regular Employees:	$
Estimated Base Year Total Price for Bodyguards:	$
Estimated Base Year Total	**$**

B.2.6.2 First Option Year

The fixed monthly prices/premium rates per Age-Group to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.6.2.1 Monthly Rates per Regular Employee

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[o]	Monthly Rate	Annual Rate
1001	18-30	a.	Basic Life	89	$	$
		b.	Accidental Death	89	$	$
		c.	Total Permanent Disability	89	$	$
1002	31-45	a.	Basic Life	823	$	$
		b.	Accidental Death	823	$	$
		c.	Total Permanent Disability	823	$	$
1003	46-60	a.	Basic Life	715	$	$
		b.	Accidental Death	715	$	$
		c.	Total Permanent Disability	715	$	$
1004	61-70	a.	Basic Life	67	$	$
		b.	Accidental Death	67	$	$
		c.	Total Permanent Disability	67	$	$
1005	+71	a.	Basic Life	3	$	$
		b.	Accidental Death	3	$	$
		c.	Total Permanent Disability	3	$	$
					Estimated Total Price for First Option Year	$

[o] *Estimated Quantity does not include any Riders (B.1.1)*

B.2.6.2.2 Bi-Weekly Rates per Bodyguard

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[p]	Monthly Rate	Annual Rate
1006	18-30	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
1007	31-45	a.	Basic Life	16	$	$
		b.	Accidental Death	16	$	$
		c.	Total Permanent Disability	16	$	$
1008	46-60	a.	Basic Life	17	$	$
		b.	Accidental Death	17	$	$
		c.	Total Permanent Disability	17	$	$
1009	61-70	a.	Basic Life	1	$	$
		b.	Accidental Death	1	$	$
		c.	Total Permanent Disability	1	$	$
1010	+71	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
Estimated First Option Year Total Price for Bodyguards						**$**

B.2.6.2.3 First Option Year Total

Estimated First Option Year Total Price for Regular Employees:	$
Estimated First Option Year Total Price for Bodyguards:	$
Estimated First Option Year Total	**$**

B.2.6.3 Second Option Year

The fixed monthly prices/premium rates per Age-Group to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.6.3.1 Monthly Rates per Regular Employee

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[q]	Monthly Rate	Annual Rate
2001	18-30	a.	Basic Life	89	$	$
		b.	Accidental Death	89	$	$
		c.	Total Permanent Disability	89	$	$
2002	31-45	a.	Basic Life	823	$	$
		b.	Accidental Death	823	$	$
		c.	Total Permanent Disability	823	$	$
2003	46-60	a.	Basic Life	715	$	$
		b.	Accidental Death	715	$	$

[p] *Estimated Quantity does not include any Riders (B.1.1)*
[q] *Estimated Quantity does not include any Riders (B.1.1)*

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[q]	Monthly Rate	Annual Rate
		c.	Total Permanent Disability	715	$	$
2004	61-70	a.	Basic Life	67	$	$
		b.	Accidental Death	67	$	$
		c.	Total Permanent Disability	67	$	$
2005	+71	a.	Basic Life	3	$	$
		b.	Accidental Death	3	$	$
		c.	Total Permanent Disability	3	$	$
Estimated Total Price for Second Option Year						$

B.2.6.3.2 Bi-Weekly Rates per Bodyguard

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[r]	Monthly Rate	Annual Rate
2006	18-30	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
2007	31-45	a.	Basic Life	16	$	$
		b.	Accidental Death	16	$	$
		c.	Total Permanent Disability	16	$	$
2008	46-60	a.	Basic Life	17	$	$
		b.	Accidental Death	17	$	$
		c.	Total Permanent Disability	17	$	$
2009	61-70	a.	Basic Life	1	$	$
		b.	Accidental Death	1	$	$
		c.	Total Permanent Disability	1	$	$
2010	+71	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
Estimated Second Option Year Total Price for Bodyguards						**$**

B.2.6.3.3 Second Option Year Total

Estimated Second Option Year Total Price for Regular Employees:	$
Estimated Second Option Year Total Price for Bodyguards:	$
Estimated Second Option Year Total	**$**

[r] *Estimated Quantity does not include any Riders (B.1.1)*

B.2.6.4 Third Option Year

The fixed monthly prices/premium rates per Age-Group to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.6.4.1 Monthly Rates per Regular Employee

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[s]	Monthly Rate	Annual Rate
3001	18-30	a.	Basic Life	89	$	$
		b.	Accidental Death	89	$	$
		c.	Total Permanent Disability	89	$	$
3002	31-45	a.	Basic Life	823	$	$
		b.	Accidental Death	823	$	$
		c.	Total Permanent Disability	823	$	$
3003	46-60	a.	Basic Life	715	$	$
		b.	Accidental Death	715	$	$
		c.	Total Permanent Disability	715	$	$
3004	61-70	a.	Basic Life	67	$	$
		b.	Accidental Death	67	$	$
		c.	Total Permanent Disability	67	$	$
3005	+71	a.	Basic Life	3	$	$
		b.	Accidental Death	3	$	$
		c.	Total Permanent Disability	3	$	$
					Estimated Total Price for Third Option Year	$

B.2.6.4.2 Bi-Weekly Rates per Bodyguard

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[t]	Monthly Rate	Annual Rate
3006	18-30	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
3007	31-45	a.	Basic Life	16	$	$
		b.	Accidental Death	16	$	$
		c.	Total Permanent Disability	16	$	$
3008	46-60	a.	Basic Life	17	$	$
		b.	Accidental Death	17	$	$
		c.	Total Permanent Disability	17	$	$
3009	61-70	a.	Basic Life	1	$	$
		b.	Accidental Death	1	$	$
		c.	Total Permanent Disability	1	$	$
3010	+71	a.	Basic Life	0	$	$

[s] *Estimated Quantity does not include any Riders (B.1.1)*
[t] *Estimated Quantity does not include any Riders (B.1.1)*

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[t]	Monthly Rate	Annual Rate
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
Estimated Third Option Year Total Price for Bodyguards						**$**

B.2.6.4.3 Third Option Year Total

Estimated Third Option Year Total Price for Regular Employees:	$
Estimated Third Option Year Total Price for Bodyguards:	$
Estimated Third Option Year Total	**$**

B.2.6.5 Fourth Option Year

The fixed monthly prices/premium rates per Age-Group to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.6.5.1 Monthly Rates per Regular Employee

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[u]	Monthly Rate	Annual Rate
4001	18-30	a.	Basic Life	89	$	$
		b.	Accidental Death	89	$	$
		c.	Total Permanent Disability	89	$	$
4002	31-45	a.	Basic Life	823	$	$
		b.	Accidental Death	823	$	$
		c.	Total Permanent Disability	823	$	$
4003	46-60	a.	Basic Life	715	$	$
		b.	Accidental Death	715	$	$
		c.	Total Permanent Disability	715	$	$
4004	61-70	a.	Basic Life	67	$	$
		b.	Accidental Death	67	$	$
		c.	Total Permanent Disability	67	$	$
4005	+71	a.	Basic Life	3	$	$
		b.	Accidental Death	3	$	$
		c.	Total Permanent Disability	3	$	$
Estimated Total Price for Fourth Option Year						$

B.2.6.5.2 Bi-Weekly Rates per Bodyguard

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[v]	Monthly Rate	Annual Rate
4006	18-30	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$

[u] *Estimated Quantity does not include any Riders (B.1.1)*
[v] *Estimated Quantity does not include any Riders (B.1.1)*

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[v]	Monthly Rate	Annual Rate
		c.	Total Permanent Disability	0	$	$
4007	31-45	a.	Basic Life	16	$	$
		b.	Accidental Death	16	$	$
		c.	Total Permanent Disability	16	$	$
4008	46-60	a.	Basic Life	17	$	$
		b.	Accidental Death	17	$	$
		c.	Total Permanent Disability	17	$	$
4009	61-70	a.	Basic Life	1	$	$
		b.	Accidental Death	1	$	$
		c.	Total Permanent Disability	1	$	$
4010	+71	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
Estimated Fourth Option Year Total Price for Bodyguards						**$**

B.2.6.5.3 Fourth Option Year Total

Estimated Fourth Option Year Total Price for Regular Employees:	$
Estimated Fourth Option Year Total Price for Bodyguards:	$
Estimated Fourth Option Year Total	**$**

B.2.6.6 52.217-8 Extension

The fixed monthly prices/premium rates per Age-Group to provide Basic Life, Accidental Death and Total Permanent Disability insurance coverage are as follows:

B.2.6.6.1 Monthly Rates per Regular Employee

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[w]	Monthly Rate	6-Month
5001	18-30	a.	Basic Life	89	$	$
		b.	Accidental Death	89	$	$
		c.	Total Permanent Disability	89	$	$
5002	31-45	a.	Basic Life	823	$	$
		b.	Accidental Death	823	$	$
		c.	Total Permanent Disability	823	$	$
5003	46-60	a.	Basic Life	715	$	$
		b.	Accidental Death	715	$	$
		c.	Total Permanent Disability	715	$	$
5004	61-70	a.	Basic Life	67	$	$
		b.	Accidental Death	67	$	$
		c.	Total Permanent Disability	67	$	$

[w] *Estimated Quantity does not include any Riders (B.1.1)*

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[w]	Monthly Rate	6-Month
5005	+71	a.	Basic Life	3	$	$
		b.	Accidental Death	3	$	$
		c.	Total Permanent Disability	3	$	$
					Estimated Total Price for 52.217-8 Extension	$

B.2.6.6.2 Bi-Weekly Rates per Bodyguard

CLIN	Age-Group	SUBCLIN	Type of Insurance	Estimated Quantity[x]	Monthly Rate	6-Month
5006	18-30	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
5007	31-45	a.	Basic Life	16	$	$
		b.	Accidental Death	16	$	$
		c.	Total Permanent Disability	16	$	$
5008	46-60	a.	Basic Life	17	$	$
		b.	Accidental Death	17	$	$
		c.	Total Permanent Disability	17	$	$
5009	61-70	a.	Basic Life	1	$	$
		b.	Accidental Death	1	$	$
		c.	Total Permanent Disability	1	$	$
5010	+71	a.	Basic Life	0	$	$
		b.	Accidental Death	0	$	$
		c.	Total Permanent Disability	0	$	$
					Estimated 52.217-8 Extension Total Price for Bodyguards	**$**

B.2.6.6.3 52.217-8 Extension Total

Estimated 52.217-8 Extension Total Price for Regular Employees:	$
Estimated 52.217-8 Extension Total Price for Bodyguards:	$
Estimated 52.217-8 Extension Total	**$**

[x] *Estimated Quantity does not include any Riders (B.1.1)*

B.3 GRAND TOTAL

As per paragraph B.2.2, above, Grand Total is shown in *[insert currency: _____]*

B.3.1 Salary-Based Rates

Base Year Total	$
First Option Year Total	$
Second Option Year Total	$
Third Option Year Total	$
Fourth Option Year Total	$
Extended 6-Month Period Total	$
GRAND TOTAL	$

B.3.2 Age-Based Prices

Base Year Total	$
First Option Year Total	$
Second Option Year Total	$
Third Option Year Total	$
Fourth Option Year Total	$
Extended 6-Month Period Total	$
GRAND TOTAL	$

B.4 MINIMUM AND MAXIMUM AMOUNTS

During the Base Year of the contract, and during the option year that might be exercised, the United States Government (USG) shall place orders totaling a minimum of $3,000.00USD. This reflects the contract minimum guarantee for each period of performance. The amount of all orders, for base and all option years shall not exceed TBD [This amount will be included based on the premium rates offered by the awarded company]. This reflects the contract maximum.

B.5 ADMINISTRATIVE RETENTION AMOUNTS

B.5.1 Definition of Retention Amount

The retention amount is part of the premium and may include, but not be limited to, such costs as overhead and general and administrative costs. It will also include any profit. Essentially, it includes all costs except the actual portion of the premium intended to fund claims paid to the health care provider/claimant. B.5.3 sets forth the retention amounts per premium paid for each category of premium and for each period of performance.

The retention amount is a fixed portion of the premium established in Section B.2, Prices, and shall not be subject to adjustment for any reason. The retention amount includes, but is not limited to, overhead, general and administrative expenses, and profit. It comprises all costs other than the portion of the premium intended to fund claims paid to the claimant. Section B.5.3 specifies the applicable retention amounts per premium paid for each category of premium and for each period of performance.

B.5.2 ***Fixed Retention Amount***

If the Contractor submits a request for an economic price adjustment pursuant to Section B.6, the Contractor shall provide detailed, audited cost experience data that clearly identifies and itemizes the retention amount. For purposes of any economic price adjustment, the retention amount is a fixed component of the premium rates established in Section B.2. This retention amount shall be treated as fixed for the duration of the contract and shall not be subject to adjustment for any reason.

B.5.3 ***Retention Amounts per Premium***

As per paragraph B.2.2, above, retention amounts are shown in [*insert currency:* _____].

B.5.3.1 ***Retention Amount for Salary-Based Premiums***

Retention Amounts per separate premium paid for each category of premium and for each period of performance.

B.5.3.1.1 Bi-Weekly Retention Amount per Regular Employee

Period of Performance	Basic Life	Accidental Death	Total Disability Coverage
Base Period	$	$	$
First Option Year	$	$	$
Second Option Year	$	$	$
Third Option Year	$	$	$
Fourth Option Year	$	$	$
52.217-8 Extension	$	$	$

*** NOTE TO OFFEROR: Fill in the fixed retention amounts above for each period of performance and for each category of premium. This fixed amount shall be expressed in the currency in which the premium amount is proposed. The fixed retention amount shall NOT be expressed in terms of a percentage of the premium.**

B.5.3.1.2 Bi-Weekly Retention Amount per Bodyguard

Period of Performance	Basic Life	Accidental Death	Total Disability Coverage
Base Period	$	$	$
First Option Year	$	$	$
Second Option Year	$	$	$
Third Option Year	$	$	$

Period of Performance	Basic Life	Accidental Death	Total Disability Coverage
Fourth Option Year	$	$	$
52.217-8 Extension	$	$	$

*** NOTE TO OFFEROR: Fill in the fixed retention amounts above for each period of performance and for each category of premium. This fixed amount shall be expressed in the currency in which the premium amount is proposed. The fixed retention amount shall NOT be expressed in terms of a percentage of the premium.**

B.5.3.2 Retention Amount for Age-Based Premiums

Retention Amounts per separate premium paid for each category of premium and for each period of performance.

B.5.3.2.1 Monthly Retention Amount per Regular Employee

Period of Performance	Age Group	Basic Life	Accidental Death	Total Disability Coverage
Base Period	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
First Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
Second Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
Third Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
Fourth Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$

Period of Performance	Age Group	Basic Life	Accidental Death	Total Disability Coverage
52.217-8 Extension	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$

*** NOTE TO OFFEROR: Fill in the fixed retention amounts above for each period of performance and for each category of premium. This fixed amount shall be expressed in the currency in which the premium amount is proposed. The fixed retention amount shall NOT be expressed in terms of a percentage of the premium.**

B.5.3.2.2 Monthly Retention Amount per Regular Employee

Period of Performance	Age Group	Basic Life	Accidental Death	Total Disability Coverage
Base Period	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
First Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
Second Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
Third Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
Fourth Option Year	18-30	$	$	$
	31-45	$	$	$
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$
52.217-8 Extension	18-30	$	$	$
	31-45	$	$	$

Period of Performance	Age Group	Basic Life	Accidental Death	Total Disability Coverage
	46-60	$	$	$
	61-70	$	$	$
	+71	$	$	$

*** NOTE TO OFFEROR: Fill in the fixed retention amounts above for each period of performance and for each category of premium. This fixed amount shall be expressed in the currency in which the premium amount is proposed. The fixed retention amount shall NOT be expressed in terms of a percentage of the premium.**

B.6 ECONOMIC PRICE ADJUSTMENT-GROUP LIFE INSURANCE PREMIUMS

B.6.1 Premium Adjustment Based on Experience

For group life insurance, prices may be adjusted upward or downward based on the experience rating of the Mission(s) covered by this contract, and it specifically excludes all riders in B.1.1.

B.6.1.1 Period to Request Adjustments.

No adjustment will be allowed during the first twelve months. After such time, the Contractor or the Government may request an adjustment in premiums on an annual basis.

Adjustments are not retroactive to previous contract terms.

B.6.1.2 Requirements to Request Adjustments

Before the Government exercises any economic price adjustment, the Contractor shall provide supporting documentation substantiating the basis for the requested adjustment. This documentation shall clearly identify the information by Contract Line Item Number (CLIN) as priced under Section B.2 and shall specify: (1) the type of premium (e.g., Basic Life, Accidental Death, Total Disability Coverage); (2) the applicable employee group (e.g., Regular Employees, Bodyguards); and (3) the contract year to which the data applies. All supporting documentation shall correspond to the immediate previous contract year and shall include, at a minimum:

a. A balance sheet, audited and certified by an independent third party, showing the following components for the relevant period:

i. Receipts (total premiums paid by the U.S. Government). The Contractor shall break out these receipts into: (a) the portion attributable to the retention amount and (b) the portion attributable to claims funding, and shall present this breakdown separately for each type of premium (e.g., Basic Life, Accidental Death, Total Disability Coverage), for each employee group (e.g., Regular Employees, Bodyguards), and for each policy.

ii. The number of insurance plans in force, by type of premium (e.g., Basic Life, Accidental Death, Total Disability Coverage), by employee group, and by policy.

iii. Claims paid, by type of premium (e.g., Basic Life, Accidental Death, Total Disability Coverage), by employee group, and by policy.

b. A certification from an independent third party confirming that all claims have been paid in accordance with the contract coverage and applicable local insurance policies and regulations.

B.6.1.3 Retention Amount

The retention amount will remain fixed and is not subject to adjustment. Economic Price Adjustments will apply solely to the portion of the premium allocated for the payment of claims.

B.6.1.4 Additional Third Party Review

The Government reserves the right to have an independent third party review the balance sheet and claims and make recommendations regarding the appropriateness of the requested adjustment.

B.6.1.5 Mutual Agreement

Any adjustment shall be subject to mutual agreement of the parties and shall result in a written modification to the contract. Mutually agreed to adjustments shall be effective thirty days after complete information is received by the Government. Any failure to reach agreement under this clause shall be subject to the procedures in the Disputes clause.

B.6.2 Premium Adjustment Based on Laws

The rates may also be adjusted during the performance period of the contract as a result of laws enacted by the host Government, if such change in the laws has a direct impact on the cost to the Contractor to perform this contract at the contracted rate. In that event, the Contracting Officer may enter into negotiations with the Contractor to modify the contract to adjust the premium rate. The Contractor agrees to provide all documentation necessary to support any requested adjustment.

SECTION C – DESCRIPTION/SPECIFICATION/WORK STATEMENT

C.1 GROUP LIFE INSURANCE SERVICES

The Government of the United States of America requires group life insurance coverage for its employees at the U.S. Embassy in Mexico City, U.S. Consulates, and other U.S. offices located within Mexican territory. The Government has determined that the prevailing practice by employers in Mexico is that group life insurance coverage is representative of locally prevailing compensation practice and that the cost of such insurance protection is usually borne by the employer. Therefore, the Government desires to adopt such locally prevailing practice as part of its compensation plan for its employees as outlined in this Section C and in accordance with the terms and conditions specified throughout this contract.

C.1.1 Group life Insurance Coverage

The amounts of life insurance coverage for each employee, as outlined below, are based on 100% of the premium cost, irrespective of the payment status of the policy or the specific date within the contract year to which the coverage applies.

The group life insurance coverage amounts are as follows:

C.1.1.1 Amount of Basic Life Insurance for Employee Natural Death

The employee's estate or employee's named beneficiary(ies) will receive an amount equal to thirty-two (32) times the amount of monthly basic salary, in the event the employee dies of natural causes

C.1.1.2 Amount of Accidental Death

The employee's estate or employee's named beneficiary(ies) will receive an amount equal to forty-six (46) times the amount of monthly basic salary, in the event the employee is killed in an accident and in case of work-related death.

C.1.1.3 Total Permanent Disability

The employee will receive an amount equal to forty (40) times the amount of monthly basic salary when employment ends due to total permanent disability.

C.1.2 Life Insurance Benefits Conditions and Limitations

Conditions and limitations on the entitlement to life insurance benefits under this contract are as follows:

C.1.2.1 Exclusions for War-Related Events

No benefits shall be payable if an employee's death or other insurance event was caused directly or indirectly by war. War shall be defined as declared or non-declared war or any martial operations or invasion, hostile acts of foreign powers, rebellion, riot, civil war, uprising, mutiny,

operations by military or usurpatory authorities, martial law or state of siege or any other similar event or reason for declaring martial law or war. A terrorist attack shall not be considered war.

C.1.2.2 Other Exclusions

No benefit shall be payable under this contract if the employee's bodily injuries have been caused directly or indirectly and totally or partially by:

a) Violating the law or in resisting detention or arrest,

b) Participation in competitions involving the use of wheeled vehicles, horses, boats or water skis,

c) An accident resulting from the employee being under the influence of alcohol, drugs or other toxic substance unless administered by a physician. Death as a result of a disease or physical or mental infirmities and medical or surgical treatment thereof (except pyogenic infection due to an accidental cut or wound) shall be considered a natural and not an accidental death. Suicide will not be covered.

C.1.3 Eligible Participants

C.1.3.1 Definition of Eligible Employees

Employees eligible for group life insurance coverage include all current active employees of the United States Government who are employed within the geographic boundaries of Mexico, paid under the Local Compensation Plan, and certified by the Contracting Officer.

C.1.3.2 Covered Employees

Covered employees include Foreign Service Nationals (FSNs) and locally hired U.S. citizens who meet the following criteria:

a) Working on a full-time or part-time basis under non-temporary direct-hire appointments or personal services agreements/contracts (PSA) that are not time-limited to less than one year.

b) Hired as Locally Employed (LE) Staff.

c) Paid under the Local Compensation Plan.

C.1.3.3 Location of Employment

The individuals described under C.1.3, above, must be employed within the geographic boundaries of Mexico by:

- Department of State (DOS)
- Department of Agriculture (USDA)

- Department of Commerce (DOC)
- Department of Energy (DOE)
- Department of Health and Human Services (HHS)
- Department of Homeland Security (DHS)
- Department of Justice (DOJ)
- Department of Labor (DOL)
- Department of the Interior (DOI)
- Department of the Treasury
- Department of Transportation (DOT)
- Department of War (DOW)
- Peace Corps (PC)

C.1.3.4 Participants Covered Under a Rider

C.1.3.4.1 Official Residence Expense (ORE) employees

a) All current active employees of the Chief of Mission, the Deputy Chief of Mission and Consuls General assigned to their respective official Government residences and paid under an ORE account (see separate rider, Exhibit B).

b) All costs for ORE employees are the responsibility of the employing officer, not the U.S. Government.

C.1.3.5 Individuals not Eligible for Coverage

The following individuals are not eligible for coverage:

a) Locally Employed (LE) Staff working under temporary appointments.

b) LE Staff working under a PSA or PSC that is time limited to less than one year.

c) LE Staff with an intermittent (When Actually Employed (WAE)) workweek schedule.

d) Non-personal services contract personnel and their employees, supplied by an independent contractor licensed to do business in Mexico who provides services to other local organizations as well as to the U.S. Mission Mexico.

e) Peace Corps personal services contractors as indicated in MS 74.

f) Dependents are not covered.

g) Retirees are not covered.

C.1.4 Eligibility and Effective Date

C.1.4.1 Term of Eligibility and Effective Date

Each current active eligible employee is enrolled for life insurance and disability benefits under this contract upon award and thereafter during the performance period of this contract. Each new eligible employee will be enrolled upon entering on duty with the United States Government. An employee is considered active ("on the rolls") whenever such employee is on approved leave, whether paid or unpaid.

During a period of Leave Without Pay (LWP) or unpaid leave that is one pay period or less, coverage under the insurance contract will continue. The USG will pay the total premium cost to the Contractor.

C.1.4.2 Period of Ineligibility

Employees are not entitled to life insurance and disability benefits hereunder during any period of employment for which premiums are not paid.

During a period of extended (beyond one pay period) of Leave Without Pay (LWP) or unpaid leave, the employee is responsible for the full cost of the insurance premiums. The Mission will pay the premiums directly to the Contractor, and will collect the full cost from the employee on a quarterly basis. Alternatively, the employee may elect to have coverage cease if that employee prefers not to pay the premium.

C.1.5 Brochure Requirement

C.1.5.1 Format and Language

The Contractor shall provide a comprehensive document (brochure, pamphlet, or other written material) in both Spanish and English that lists all life insurance benefits and procedures provided under this contract. The brochure must be produced in sufficient quantities to ensure that each covered employee receives a copy. All copies of the brochure shall be delivered to the Contracting Officer's Representative (COR), who will oversee appropriate distribution to employees.

C.1.5.2 Delivery Timeline

The Contractor shall deliver the document described in C.1.5.1 to the COR no later than sixty (60) days after the date of contract award. For new employees, the Contractor shall provide additional brochures within ten (10) business days of the COR's request.

C.1.5.3 Accuracy and Compliance

The Contractor is fully responsible for ensuring that the document described in C.1.5.1 accurately reflects the requirements, coverage, and terms of the contract, as outlined in the Contractor's technical proposal. In all cases, the contract terms shall take precedence. If the COR identifies inaccuracies in the document, the Contractor will be notified in writing. However, failure by the U.S. Government to identify inaccuracies does not limit, revise, or otherwise affect the Contractor's obligation to fully comply with all contract terms.

C.1.6 Presentations

C.1.6.1 Quarterly Presentations

The Contractor shall conduct quarterly presentations in both English and Spanish for the COR and requesting office principals. These presentations shall address the status of claims, overall policy performance, and any relevant updates.

C.1.6.2 Employee Information Sessions

The Contractor shall conduct presentations on an as-needed basis, as requested by the COR, to explain benefits, procedures, requirements, and provide Q&A sessions for covered Local Employees. These sessions shall be conducted in both English and Spanish to ensure accessibility and clarity for all participants.

C.2 DEFINITIONS

CLIN	Contract Line-Item Number.
CO	Contracting Officer, i.e., the person appointed with the authority to enter in and administer contracts on the behalf of the Government.
COR	Contracting Officer's Representative, i.e., an individual designated in writing by the Contracting Officer to perform specific contract administration functions. The Contracting Officer's Representative (COR) for this contract is the Human Resources Compensation and Legal Coordinator.
Currency	Claim reimbursements shall be paid in local currency.
Disability – Total and Permanent	A physical or mental impairment which precludes the individual from performing ordinary motor or bodily functions and which requires separation from employment. If the impairment is the result of a previous impairment, it shall be considered a continuation of the prior impairment. Payment of Total and Permanent disability as stated in section paragraph C.1.1.3 shall be completed no later than sixty (60) days

	from submission by the employee of the Initial ST-4 form "Dictamen de Invalidez" issued by the Instituto Mexicano del Seguro Social.
Employee	An individual employed by the U.S. Government, under a direct-hire appointment or personal services agreement (PSA), as further defined in Section C.1.3, above. This may also include ORE Staff as stated in Section C.1.3.4.
Employer	The Government of the United States of America. In the case of ORE it means the Chief of Mission, Deputy Chief of Mission or Consul General.
FMC	The paying office for all U.S. Government Agencies stated in Section C.1.3.3.
FMO	The Financial Management Officer.
Government	The Government of the United States of America unless specifically stated otherwise.
GSO	General Services Officer in charge of the General Services Office at post. This officer is usually the Contracting Officer (CO) for this contract.
GTM	Government Technical Monitor, individual designated by the contracting officer to assist the COR in monitoring a contractor's performance.
HR	Human Resources Office at post. The COR is an employee working for this office.
HRO	The Human Resources Officer.
IMSS	The Mexican Social Security Institute (Instituto Mexicano del Seguro Social, IMSS) is the entity responsible for issuing determinations regarding total permanent disability.
Insured Individual	Locally Employed Staff covered under this contract.
Maximum Benefit	The total amount that will be paid to any one covered individual for covered individual for life insurance/disability benefit.

MXP	Mexican Pesos.
ORE	Official Residence Expense (ORE) refers to the costs associated with the staff working in Official Residences assigned to and managed by Mission Mexico.
RFP	Request for Proposal.
Salary	Monthly salary is one-twelfth of the employee's annual basic salary, exclusive of premium pay, allowances, bonuses, or any other separate payments.
ST-4 Form	The ST-4 Form is the official document issued by the Mexican Social Security Institute (Instituto Mexicano del Seguro Social, IMSS) to certify and determine total permanent disability.
USG	The Government of the United States of America.

SECTION D – PACKAGING AND MARKING

(RESERVED)

SECTION E – INSPECTION AND ACCEPTANCE

E.1 52.252-2 Clauses Incorporated by Reference (FEB 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. In addition, the full text of a clause may be accessed electronically at: Acquisition.gov this address is subject to change.

If the Federal Acquisition Regulation (FAR) is not available at the location indicated above, use the Department of State Acquisition website at e-CFR to see the links to the FAR. You may also use an Internet "search engine" (for example, Google, Yahoo or Excite) to obtain the latest location of the most current FAR.

THE FOLLOWING FEDERAL ACQUISITION REGULATION CLAUSE(S) IS/ARE INCORPORATED BY REFERENCE:

CLAUSE	TITLE AND DATE
52.246-4	INSPECTION OF SERVICES - FIXED PRICE (AUG 1996)

E.2 QUALITY ASSURANCE AND SURVEILLANCE PLAN (QASP)

This plan is designed to provide an effective surveillance method to promote effective Contractor performance. The QASP provides a method for the Contracting Officer's Representative (COR) to monitor Contractor performance, advise the Contractor of unsatisfactory performance, and notify the Contracting Officer of continued unsatisfactory performance. The Contractor and/or the assigned insurer for the program, not the Government, is responsible for management and quality control to meet the terms of the contract. The role of the Government is to conduct quality assurance to ensure that contract standards are achieved.

Performance Objective	PWS Paragraph	Performance Threshold
Services Performs all the insurance services set forth in the Description/Specification/Work Statement.	C.1.0 through C.1.6	All required services are performed, and no more than three (3) customer complaints are received per month.
Brochure	C.1.5	A Brochure as approved and accepted by the COR is delivered within 60 days from contract award.

Performance Objective	PWS Paragraph	Performance Threshold
Service Issue Resolution and Escalation	E.5	All Service Issues are resolved and/or escalated requests are provided within the time stated in E.5 and no more than three (3) customer valid complaint is received per month.
Customer Support and Assistance	G.8.2	All Customer Support and Assistance requests are provided within the time stated in G.8.2.2 and no more than three (3) customer valid complaint is received per month.

E.2.1 Surveillance

The COR will receive and document all complaints from Government personnel regarding the services provided. If appropriate, the COR will send the complaints to the Contractor for corrective action.

E.2.2 Standard

The performance standard is that the Government receives no more than three (3) customer complaints per month. The COR shall notify the Contracting Officer of the complaints so that the Contracting Officer may take appropriate action to enforce the inspection clause (FAR 52.246-4, INSPECTION OF SERVICES – FIXED PRICE (AUG 1996) or the appropriate Inspection of Services clause), if any of the services exceed the standard.

E.2.3 Procedures

(a) If any Government personnel observe unacceptable services, either incomplete work or required services not being performed, they should immediately contact the COR.

(b) The COR will complete appropriate documentation to record the complaint.

(c) If the COR determines the complaint is invalid, the COR will advise the complainant. The COR will retain the annotated copy of the written complaint for his/her files.

(d) If the COR determines the complaint is valid, the COR will inform the Contractor and give the Contractor additional time to correct the defect, if additional time is available. The COR shall determine how much time is reasonable.

(e) The COR shall, as a minimum, orally notify the Contractor of any valid complaints.

(f) If the Contractor disagrees with the complaint and challenges the validity of the complaint, the Contractor will notify the COR. The COR will review the matter to determine the validity of the complaint.

(g) The COR will consider complaints as resolved unless notified otherwise by the complaint.

(h) Repeat customer complaints are not permitted for any services. If a repeat customer complaint is received for the same deficiency during the service period, the COR will contact the Contracting Officer for appropriate action under the Inspection clause.

E.3 QUALITY ASSURANCE TEAM (QAT)

The Contractor shall designate personnel responsible for Quality Assurance (QA)functions related to Section E.2. These individuals may operate as a team or in a capacity appropriate to the scope and volume of work. Upon receiving complaints, the designated QA personnel shall take timely corrective action to ensure effective operation. All designated personnel shall be proficient in written and spoken English. The Contractor shall provide oral and written notice to the COR regarding the status and resolution of each complaint, with a maximum response time of seven (7) business days. The names and roles of the designated QA personnel under this Contract shall be provided at award.

E.4 SERVICE LEVEL AGREEMENTS

The Contractor and the U.S. Government shall conduct formal reviews of all Service Level Agreements (SLAs) on a quarterly, semi-annual, and annual basis. These reviews will assess performance, address emerging needs, and identify necessary adjustments. Any changes to SLAs must be mutually agreed upon and documented in writing.

All SLAs shall be customized to reflect the specific requirements outlined in this contract and the unique needs of the geographic regions covered. SLAs will be updated as needs evolve or as new challenges arise to ensure continued alignment with contract objectives and regional demands.

E.5 SERVICE ISSUE RESOLUTION AND ESCALATION

E.5.1 Issue Resolution Timeframe

The Contractor shall resolve any service issues or complaints within 15 business days of receiving notification.

E.5.2 ***Issue Escalation and Resolution Process***

The provider must maintain a clear escalation process for unresolved issues. A final resolution must be provided within 15 business days of escalation.

SECTION F – DELIVERIES OR PERFORMANCE

F.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. In addition, the full text of a clause may be accessed electronically at: Acquisition.gov this address is subject to change.

If the Federal Acquisition Regulation (FAR) is not available at the location indicated above, use the Department of State Acquisition website at e-CFR to see the links to the FAR. You may also use an Internet "search engine" (for example, Google, Yahoo or Excite) to obtain the latest location of the most current FAR.

THE FOLLOWING FEDERAL ACQUISITION REGULATION CLAUSES ARE INCORPORATED BY REFERENCE:

CLAUSE	TITLE AND DATE
52.242-15	STOP WORK ORDER (AUG 1989)
52.242-17	GOVERNMENT DELAY OF WORK (APR 1984)

F.2 PERIOD OF PERFORMANCE

The performance period of this contract is one year beginning on the date stated in the Award Letter with four (4) one-year options to renew.

F.3 OPTIONS

(a) The Government may extend this contract in accordance with the option clause at Section I, clause I.2, FAR Clauses Incorporated by Full Text (FAR 52.217-9, Option to Extend the Term of the Contract), which also specifies the total potential duration of the contract.

(b) The Government may exercise the option set forth at Section I, "FAR 52.217-8, Option to Extend Services".

F.4 REPORTS AND OTHER DELIVERABLES

All reports and other deliverables required under this contract shall be delivered to the following address:

Attention: Mission Mexico Benefits Unit

Mexicosegurosmv@state.gov

F.4.1 Deliverables

The Contractor shall deliver the following items under this contract:

Description	**Quantity**	**Delivery Date**	**Delivery to:**
C.1.5 Brochure	As needed	Within (60) sixty days after award of the contract and as needed.	COR/GTM
C.1.6 Presentations	As needed	As stated in section C.1.6.	CO/ COR/GTM /Users
E.2 Quality Management Plan (QMP)	1	Within (10) ten business days after award of the contract.	COR/GTM
E.3 Quality Assurance Team (QAT)	1	• Within (10) ten business days after award of the contract. • With notification of replacement.	COR/GTM, FMC and CO
E.4 Service Level Agreements	As needed	As needed. See E.4.	COR/GTM, FMC and CO
F.5.2 (a) Insurance Policies	As needed	Within (14) fourteen calendar days of receiving a fully approved Task Order.	COR/GTM
F.5.2 (b) Insurance Policies for Employees added during the Period of Performance	1	On the same day of Issuance.	COR/GTM
G.4 Invoices	As needed	Quarterly, semi-annual or annual as agreed with the COR.	Vendor Portal
G.5 Refund confirmation	1	Within thirty (30) calendar days	COR, FMC and CO

Description	**Quantity**	**Delivery Date**	**Delivery to:**
G.8.1.4English Language Proficiency Certification	1	• Within (30) thirty days from Contract Award. • With notification of replacement.	CO / COR/GTM
H.5.1 Quarterly Claims Report	1	5th day of each month.	COR/GTM
H.5.2 Ad-Hoc Report	TBD	As agreed with COR	COR/GTM
H.5.3 Insured Employees Report	1	• Within ten (10) business days after receiving all fully approved Task Orders. • Within five (5) business days of receiving a new Task Order, a Task Order modification that revises the employees to be insured, or any modification requested by the COR or GTM.	COR/GTM
H.6.4 Audit Documentation	As needed	Within (30) thirty days from formal request.	CO / COR/GTM

F.5 INSURANCE POLICIES

F.5.1 Issuance

The Contractor shall issue an insurance policy for each group of employees as requested by the Contracting Officer's Representative (COR) and as specified in the individual Task Orders. Each policy shall adhere to the same terms, conditions, benefits, and coverages outlined in this contract. The U.S. Government will require, at a minimum, the following separate policies or up to a maximum of eighty (80):

- Department of State (DOS)
- Serviced Agencies
- Non-Serviced Agencies

- Rider – Official Residence Expense (ORE)

F.5.2 ***Delivery***

F.5.2.1 ***Initial Insurance Certificates***

The Contractor shall provide individual insurance certificates for all U.S. Government employees within fourteen (14) calendar days of receiving the initial fully approved Task Order at the beginning of each period of performance. Coverage must commence at 00:00 hours on the starting date of each period of performance.

F.5.2.2 ***Format of Certificates***

Insurance certificates shall be provided in electronic format. Paper format certificates will only be issued upon request by the Contracting Officer's Representative (COR).

F.5.2.3 ***Certificates for Employees Added During the Period of Performance***

Insurance policies for employees added during the period of performance shall be delivered on the same day of issuance. Coverage for these employees shall begin immediately upon issuance.

F.5.3 ***Policy Validity***

The validity of insurance policies shall begin at 00:00 hours on the period of performance start date and shall end at 23:59 hours on the period of performance end date for the base year and each option year exercised.

For employees added during the period of performance, the validity of their insurance policies shall begin immediately upon issuance and shall end at 23:59 hours on the current period of performance end date.

SECTION G – CONTRACT ADMINISTRATION DATA

G.1 652.242-70 Contracting Officer's Representative (COR) (Aug 1999)

(a) The Contracting Officer may designate in writing one Government employee, by name or position title, to take action for the Contracting Officer under this contract. This designee shall be identified as a Contracting Officer's Representative (COR). Such designation shall specify the scope and limitations of the authority so delegated; provided that the designee shall not change the terms or conditions of the contract, unless the COR is a warranted Contracting Officer and this authority is delegated in the designation.

(b) The COR for this contract is the LE Staff Compensation and Legal Coordinator in the Human Resources Office.

G.2 COR DUTIES

G.2.1 Inspection, Acceptance, and Technical Oversight Responsibilities

The COR is responsible for inspection and acceptance of services. These duties include review of Contractor invoices, including the supporting documentation required by the contract. The COR may provide technical advice, substantive guidance, inspections, invoice approval, and other purposes as deemed necessary under the contract.

G.2.2 Maintenance of Updated Insurance Listings

The COR shall maintain updated list of employees, which will supersede the initial list provided under this contract and as reported to the insurer, without prejudice to the ineligibility clause.

G.2.3 Responsibility for Maintaining Eligible Listings

The COR has the additional responsibility of maintaining the eligible listing of employees for insurance coverage.

G.2.4 Authority and Limitations of the Contracting Officer's Representative (COR)

The COR may not change the terms and conditions of the contract. While the COR is authorized to provide the Contractor with updated listings of eligible employees, only the Contracting Officer may modify existing task orders or issue new task orders, reflecting these changes, since only the Contracting Officer can obligate funding and commit the Government.

G.3 PAYMENT CURRENCY

Payment shall be made in the currency stated in paragraph B.2, Prices, As per paragraph B.2.2, Currency.

G.4 SUBMISSION OF INVOICES AND PAYMENT

G.4.1 Invoice Submission

The Accounts Payable section of the US Embassy has a paperless Voucher processing system known as ILMS VENDOR PORTAL. Please follow the guidelines stated in Exhibit G, to submit a payment request through the VENDOR PORTAL. Paper or emailed invoices are no longer accepted.

Please include the following documents with your payment request:

(a) Original PDF electronic invoice (no scan copies).

(b) Banking form information (for new vendors completed and signed).

(c) Task Order

(d) CO Name

(e) W-14 (if applicable for local vendors (refer to I.2.5).

G.4.2 Invoice Requirements

To constitute a proper invoice, the invoice shall include all the items required by FAR 32.905, as well as the following minimum requirements:

(a) Electronic Invoice;

(b) Contractor's name and complete legal address;

(c) Contractor's Tax ID (RFC) and SAM Unique Entity ID

(d) Date issued;

(e) Issue Invoice as follows:

Embajada de los Estados Unidos de America
Paseo de la Reforma No. 305,
Colonia Cuauhtémoc,
Mexico, D. F., C.P. 06500;
RFC: EEU930201289;

(f) Contract Number;

(g) Task Order Number;

(h) Policy Number

(i) Period covered by the Invoice;

(j) A summary of services provided as stated in the Contract. It should include the cost breakdown of each line item.

(k) Amounts shall be in numbers and spelled out;

(l) Prompt payment discount, if any

If an invoice does not contain the above information, the United States Government reserves the right to reject the invoice as improper and return it to the Contractor within 7 calendars days. The Contractor must then submit a proper invoice.

G.4.3 Invoice, Policy and Task Order Linkage

Each invoice submitted by the Contractor shall be explicitly linked to a specific policy, as outlined in Section F.5.1, and to the corresponding Task Order, as specified in Section H.3.1.

G.4.4 Invoice Receipt Confirmation

If the Invoice is correct and accepted, the payment system will provide you with a voucher number within 3 business days after the payment request is submitted.

If the payment request is incomplete or incorrect, the system will notify you of any missing information. Contact the financial vouchering section at the below email if a confirmation is not received within 3 business days:

mexfmcinvoices@state.gov

Cc: DelacruzFS@state.gov

Mexicosegurosmv@state.gov

G.4.5 Invoice Review and Resolution

The Contracting Officer's Representative (COR), the GTM, and the FMC Payroll Office shall review each summary invoice and approve invoices for payment. The COR, GTM, and FMC Payroll Office shall be responsible for interacting with the Contractor to resolve any invoice-related issues.

G.4.6 Payment Terms and Method

Payment shall be made via Electronic Funds Transfer (EFT) within thirty (30) days after receipt of a proper invoice. Payments shall be made in the currency specified in paragraph B.2, Prices, in accordance with paragraph B.2.2, Currency.

G.4.7 Frequency of Payments

All funds under this contract shall be obligated through the issuance of task orders, as described in Section H.3, for all non-rider coverage. Each task order shall fund a specific period of time and number of employees, and task orders shall be issued at the frequency described in Section

H.3. The Contractor may submit invoices quarterly, with payment to be made at the beginning of the month for which insurance coverage is provided, in accordance with FAR 32.404. (Refer to G.4.8 for additional details.)

G.4.8 Payment Frequency and Notification

The minimum payment frequency under this contract shall be quarterly. However, if the Government determines that a policy can be paid on a semi-annual or annual basis, the Contracting Officer's Representative (COR) shall notify the Contractor accordingly. Upon notification, the Contractor shall issue an invoice reflecting the corresponding semi-annual or annual payment amount. (Refer to Section F.5.1 for details regarding the issuance of separate policies.)

G.4.9 Adjustments for Period of Performance

Every quarter of each Period of Performance, the COR, the FMC Payroll Office, and the Contractor shall collaborate to determine any necessary adjustments resulting from the addition or deletion of insured individuals during the immediately preceding period of performance. Upon agreement, and if applicable, the U.S. Government shall issue task orders reflecting the agreed adjustments. The Contractor shall submit invoices for the total amount of adjustments within ten (10) calendar days of receiving a fully approved task order.

G.4.10 Payments for U.S. Government Employees

The Government shall make payments directly to the Contractor for all U.S. Government employees, regardless of whether the employee contributes to the basic premium amount..

G.4.10.1 Riders

The Contractor shall submit a separate invoice, and the Government will make payment directly to the Contractor for the entire premium amount of the ORE staff, whether or not the ORE employee is contributing to the premium amount.

G.5 REFUNDS TO THE GOVERNMENT

If at any time during performance of the contract the Government finds that the Contractor has been overpaid because the number of employees and/or dependents covered has decreased, the Contracting Officer may either allow that overpayment to be credited to the Government's account or require that the Contractor refund the overpayment.

If FMC, on behalf of the Contracting Officer, requests a refund, the Contractor shall make that refund to the Government within ten (10) calendar days of receipt of the request. The COR/FMC shall submit to the Contractor the modified Task Order and the instructions to transfer the refund amounts. The Contractor will have thirty (30) calendar days to complete the refund upon reception of the modified Task Order and refund instructions. The Contractor shall be responsible for notifying FMC, Contracting Officer Representative and the Contracting Officer of the scheduled date of refund transfer so that the U.S. Government financial office is able to track the transfer.

G.6 VALUE ADDED TAX

Please refer to paragraph B.2.3, Value Added Tax.

G.7 POST MANAGERIAL AND ADMINISTRATIVE SUPPORT

This Contract shall be managed by three (3) offices as outlined below:

Office	Officers	Team	Group E-mail
Human Resources Office	Human Resources Officer	Benefits Unit	Mexicosegurosmv@state.gov
General Services Office	Contracting Officer	Contracting Team	mexicocitygso-contracts@groups.state.gov
Financial Management Center	Financial Management Officer	Payroll & Allowances	DelacruzFS@state.gov

G.8 CONTRACTOR'S MANAGERIAL AND ADMINISTRATIVE SUPPORT

The Contractor shall furnish all managerial and administrative support necessary to furnish the insurance under this contract.

G.8.1 Project Manager

G.8.1.1 Designation and Responsibilities of the Project Manager

The Contractor shall designate a Project Manager to oversee the daily administration of this contract and respond to any urgent requests. The Project Manager shall serve as the Contractor's primary point of contact, with delegated authority to lead the project and enough professional knowledge, skills and internal legal authority within the contractor's hierarchy. The Project Manager shall maintain close 24/7 hours communication with the COR and meet as needed to ensure effective coordination.

G.8.1.2 Availability and Alternate Coverage

The Project Manager shall be available at all times during the performance period of these services to receive and implement orders or special instructions from the Contracting Officer or COR, ensuring smooth and effective operations. In the event of the Project Manager's absence, an alternate shall serve as a replacement. The alternate must be familiar with the contract and all cases in progress to maintain continuity with enough professional knowledge, skills and internal legal authority within the contractor's hierarchy.

G.8.1.3 Notification of Project Manager Replacement

If the Contractor needs to replace the Project Manager, the Contractor shall notify the COR at least five (5) business days prior to the transition. The Contractor shall provide the name and contact information of the designated Project Manager under this contract below:

Project Manager: _____

Telephone Number(s): _____

E-mail Address: _____

G.8.1.4 English Language Proficiency Certification

The Project Manager shall submit an official and annually valid certificate demonstrating a minimum of B2 level of English language proficiency, as defined by the Common European Framework of Reference for Languages (CEFR). This certificate must be sent to the Contracting Officer (CO) and Contracting Officer's Representative (COR) within 30 days of contract award. In the event of a Project Manager replacement, the Contractor shall provide the certificate for the new prospective Project Manager along with the notification of replacement, as outlined in Section G.8.1.3.

G.8.2 Customer Support and Assistance

G.8.2.1 24/7 Customer Support

The contractor shall offer 24/7 access to customer support for policyholders, including assistance with claims, coverage questions, and emergency situations.

G.8.2.2 Response Time for Inquiries

All inquiries (email, phone, or online) shall be responded to within 24 business hours.

G.8.3 Dedicated Account Manager

A dedicated account manager must be assigned to the Department to address escalations and ensure smooth operations.

The Contractor shall designate a dedicated account manager for the daily administration of this contract and respond to any urgent requests. The Accountant Manager shall serve as the Contractor's point of contact, with enough professional knowledge and skills. The Account Manager shall be available at all times during the performance period of these services to receive and implement orders or special instructions from the Contracting Officer or COR or GTM, ensuring smooth and effective operations. In the event of the Account Manager's absence, an alternate shall serve as a replacement. The alternate must be familiar with the contract and all cases in progress to maintain continuity with enough professional knowledge and skills.

SECTION H – SPECIAL CONTRACT REQUIREMENTS

H.1 SECURITY

On occasion, a Contractor employee may require entry into U.S. Government-owned or -operated facilities. If so, the Contractor should be prepared to provide the necessary identification to permit escorted access within that facility. If unescorted access is required, the Contractor should be prepared to provide the necessary paperwork and actions for a security background check and adhered to those security guidance and correspondent approval.

H.2 STANDARDS OF CONDUCT

The Contractor shall maintain satisfactory standards of employee competency, conduct, cleanliness, professional appearance, and integrity and shall be responsible for taking such disciplinary action with respect to employees as may be necessary. Each Contractor employee is to adhere to standards that reflect credit on themselves, their employer, and the United States Government.

H.3 ORDERING PROCEDURES

H.3.1 Task Order Issuance

The Government shall issue a task order as soon as possible following contract award or after any contract modification to exercise an option year, if applicable. Each task order shall identify the number of employees to be covered under the insurance described in this contract, including the type of employee (Regular or Bodyguard), unit prices for each type of insurance (basic life, accidental death, total permanent disability), and the agency section (refer to Sections C.1.3.3 and F.5.1). The task order shall clearly specify the group of individuals and the policy covered, as outlined in Section F.5.1.

H.3.2 Revisions to Insurance Listings

Upon contract award, the COR shall provide the Contractor with an accurate and updated list of employees to be covered during the Base Year. The Contractor is responsible for reviewing the list to ensure that the numbers specified in the individual task orders match the number of employees listed by the COR.

Within ten (10) calendar days after the Contracting Officer issues written notice of the Government's intention to exercise the following option year, in accordance with FAR clauses 52.217-9 and 52.217-8, the COR shall provide the Contractor with an updated list of employees. This list shall include full information as of the pay period immediately prior to the date of the written notice.

The COR shall notify the Contractor via email of any newly hired employees to be included in the policy and coverage. The Contractor shall enroll the new employee and issue the individual policy on the same day the request is received. The date of enrollment

shall serve as the basis for calculating the prorated premium amount for the new employee.

The COR shall also notify the Contractor of any insured individual who is no longer employed by the U.S. Government. The Contractor shall immediately remove such individuals from coverage. The date of notification of removal shall serve as the basis for calculating the applicable prorated premium adjustment.

Both the COR and the Contractor are responsible for maintaining updated employee lists throughout the entire contract period. These lists shall include employees enrolled at the beginning of the contract, prior to the exercise of each option year, and any additions or deletions made during each period of performance.

H.3.3 Modified Task Orders

The COR shall consolidate all revisions described in Section H.3.2, and the Contracting Officer shall issue a new or modified task order to reflect these changes. If any updates have been made to the coverage listing, the Government anticipates issuing a new task order on an annual basis. This task order shall include all changes made since the previous task order, including any increase or decrease in necessary funding.

The updated list of eligible individuals shall supersede the initial list provided under prior task orders, without prejudice to the ineligibility clause. Task orders shall indicate the effective date of employment or removal for each individual, which shall serve as the basis for calculating the premium due.

H.3.4 Riders

Although ORE are included in this contract as a rider, their premiums shall also be covered through task orders issued by the Contracting Officer and all their actions will be managed by the COR. However, other riders included in this contract are responsible for directly interacting with the Contractor to order any coverage. When contacted, the Contractor shall advise the person of the paperwork and payment that will be necessary to order coverage for the identified individuals. The Contractor may be contacted by more than one individual.

H.4 CONTRACTOR RESPONSIBILITY IN CLAIMS AND REIMBURSEMENT TO CLAIMANTS

H.4.1 General Responsibilities

The Contractor shall be responsible for all aspects of planning, estimating, programming, project management, scheduling, dispatching, supervision, and inspection of work. The Contractor shall maintain a reference library of technical works and local laws and regulations, including current tariffs and registries. The Contractor shall treat all information provided by the Embassy concerning employees' personal data, medical information, and salaries as highly sensitive and shall not divulge any employee information to unauthorized persons.

The Contractor shall establish and implement procedures for handling life insurance claims as follows:

H.4.1.1 Administrative Records

The Contractor shall maintain life insurance files for each covered employee, including requests for claims, receipts, and proof of paid claims.

The Contractor shall provide the COR with up-to-date claim forms for each type of benefit under the contract. These forms shall include a list of required documents and clear instructions for claim filing.

The Contractor shall use the full names of employees and named beneficiaries, as stated on their Birth Certificates or Identification Cards, in all transactions. The Contractor is solely responsible for reviewing and ensuring the accuracy of names. Neither the employees nor the U.S. Government shall bear responsibility for correcting errors in name usage.

H.4.1.2 Settlement of Life Insurance Claims

The settlement of life insurance claims shall be completed as follows:

The Contractor shall provide forms for the designation of beneficiaries for life insurance benefits to the COR. The Contractor shall assist all enrolled eligible employees in completing the designation of beneficiary forms, which the COR shall retain in the HR Office. Upon the death of an enrolled employee, the COR shall provide the completed form to the Contractor.

The Contractor shall pay the employee's named beneficiary, legal heir, or estate the total amount of the claim within sixty (60) days from the date the Contractor receives a completed death claim. Payment shall be based on the coverage defined in Section C.1 and its subparagraphs.

The Contractor shall pay the employee's named beneficiary, legal heir, or estate the total amount of the claim within sixty (60) days from the date the Contractor receives a claim with the Initial ST-4 form, “Dictamen de Invalidez,” issued by the Instituto Mexicano del Seguro Social. Payment shall be based on the coverage defined in Section C.1 and its subparagraphs.

Payments shall be made in Mexican Pesos via electronic funds transfer (EFT) or check to the beneficiary designated in the form duly signed by the employee and provided by the COR to the Contractor.

H.4.1.2.1 Claim Submission and Notification Process

The Contractor shall date-stamp or electronically acknowledge and screen all claims on the day they are received. If any documents or information are missing, rendering the claim non-payable,

the Contractor shall notify the claimant within two (2) days. If the notification is written, a copy shall also be provided to the COR.

H.4.2 Compliance with Ley Federal de Protección de Datos Personales

The Contractor shall provide the necessary formats and documents for employees to complete in order to comply with the Ley Federal de Protección de Datos Personales en Posesión de los Particulares, as amended

H.5 REPORT REQUIREMENTS.

H.5.1 Quarterly Report

The Contractor shall submit a quarterly report to the Contracting Officer's Representative (COR) no later than the 10th day of the month following the end of the reporting period. This report shall provide a detailed account of all activities conducted during the previous months, including information on all policies, trends, statistics, and data for analysis.

The report shall include the following:

A list of all claims paid by the Contractor, including:

c. Name of the claimant.

d. Location of the claimant (Embassy/Consulates).

e. Date the claim was received by the Contractor.

f. Amount claimed.

g. A brief description of the coverage claims.

h. Any additional information agreed upon by the Contractor and the COR.

A list of all outstanding claims, including:

i. A brief explanation of why each claim has not been paid.

Claims information for riders shall not be included in this report.

H.5.2 Ad-Hoc Reports

The Contractor shall accommodate requests for ad hoc reports as agreed upon with the COR. Such reports shall be delivered within the agreed-upon number of business days.

H.5.3 Insured Employees Report

The Contractor shall prepare a report listing all employees insured under the contract. This report shall clearly identify the following information:

Policy number.

Certificate number.

Date of enrollment.

Coverage plan.

Any additional information required by the COR.

H.5.3.1.1 Submission Date

This report shall be submitted:

Within ten (10) business days after receiving all fully approved Task Orders.

Within five (5) business days of receiving a new Task Order, a Task Order modification revising the employees to be insured, or any modification requested by the COR or GTM.

H.5.4 ***Data Accuracy***

All reports submitted by the Contractor must meet a 98% accuracy standard. Any errors identified must be corrected and resubmitted within five (5) business days of notification to achieve 100% accuracy.

H.6 MISCELLANEOUS CONTRACTOR REQUIREMENTS

H.6.1 ***General***

The Contractor shall take all such steps as are necessary, and obtain and pay for all permits, taxes and fees as are required by the Mexican government to establish and/or operate a commercial venture locally. A contract with the U.S. Government conveys no special privileges or immunities to the Contractor. The Contractor is an independent commercial concern and not a part of the U.S. mission. The Contractor's employees are not U.S. Government employees. Registration of this contract with the Mexican government, if required by law, will be the sole responsibility of the Contractor, and any fees, taxes, or other duties shall be payable by the Contractor without recourse to the Government of the amounts thereof.

H.6.2 ***Licenses***

The Contractor shall possess all permits, licenses, and any other appointments required for the prosecution of work under this contract, all at no additional cost to the Government. The Contractor shall perform this contract in accordance with local laws.

H.6.3 ***Regulatory Compliance***

The Contractor shall comply with all applicable local, national, and international regulations. Evidence of compliance shall be provided upon request.

H.6.4 Audit Support and Documentation

The Contractor shall support audits by providing requested documentation within 15 business days upon request by the Contracting Officer. This documentation shall be used to verify the proper application of contract terms and conditions and to facilitate any required Economic Price Adjustment, as outlined in Section B.6.

H.7 ERRONEOUS PAYMENTS

If the Government becomes eligible for a refund of payment because of erroneous overpayment or other cause, the Contractor shall refund the amounts or use them to offset future payments owed by the Government, whichever the Government prefers. The Contractor shall refund any refunds not complete or discovered after the completion date of this contract.

H.8 REQUIRING ACTIVITY

The requiring activity under this contract is the Human Resources Office at the U.S. Embassy Mexico City.

H.9 AUTHORIZED ORDERING OFFICIALS

Task orders under this contract may only be approved by a warranted Contracting Officer assigned to the General Services Office at the U.S. Embassy in Mexico.

All authority to change or modify the basic IDIQ contract, including the exercising of any options, remains with the Contracting Officer assigned to the General Services Office at the U.S. Embassy Mexico City.

H.10 SIGNATURE LIMITATIONS

Neither the Contracting Officer's Representative (COR) nor the Contracting Officers shall sign commercial contracts, agreements, policies, or any other terms and conditions that conflict with this Contract, U.S. Department of State regulations, or any U.S. Federal law or policy. Furthermore, the Contracting Officer is not obligated to provide copies of identification documents in either hardcopy or electronic format.

SECTION I – CONTRACT CLAUSES

I.1 52.252-2 Clauses Incorporated By Reference (Feb 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. In addition, the full text of a clause may be accessed electronically at: Acquisition.gov this address is subject to change.

If the Federal Acquisition Regulation (FAR) is not available at the location indicated above, use the Department of State Acquisition website at e-CFR to see the links to the FAR. You may also use an Internet "search engine" (for example, Google, Yahoo or Excite) to obtain the latest location of the most current FAR.

THE FOLLOWING FAR CLAUSES ARE INCORPORATED BY REFERENCE:

CLAUSES	TITLE AND DATE
52.202-1	DEFINITIONS (JUN 2020)
52.203-3	GRATUITIES (APR 1984)
52.203-5	COVENANT AGAINST CONTINGENT FEES (MAY 2014)
52.203-6	RESTRICTIONS ON SUBCONTRACTOR SALES TO THE GOVERNMENT (JUN 2020). ALTERNATE I (NOV 2021)
52.203-7	ANTI-KICKBACK PROCEDURES (JUN 2020)
52.203-8	CANCELLATION, RESCISSION, AND RECOVERY OF FUNDS FOR ILLEGAL OR IMPROPER ACTIVITY (MAY 2014)
52.203-10	PRICE OR FEE ADJUSTMENT FOR ILLEGAL OR IMPROPER ACTIVITY (MAY 2014)
52.203-12	LIMITATION ON PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS (JUN 2020)
52.203-17	CONTRACTOR EMPLOYEE WHISTLEBLOWER RIGHTS AND REQUIREMENT TO INFORM EMPLOYEES OF WHISTLEBLOWER RIGHTS (NOV 2023)
52.203-19	PROHIBITION ON REQUIRING CERTAIN INTERNAL CONFIDENTIALITY AGREEMENTS OR STATEMENTS (JAN 2017)
52.204-7	SYSTEM FOR AWARD MANAGEMENT—REGISTRATION (APR 2026)
52.204-9	PERSONAL IDENTITY VERIFICATION OF CONTRACTOR PERSONNEL (JAN 2011)
52.204-10	REPORTING EXECUTIVE COMPENSATION AND FIRST-TIER SUBCONTRACT AWARDS (APR 2026)

52.204-13 SYSTEM FOR AWARD MANAGEMENT—MAINTENANCE (APR 2026)

52.204-19 INCORPORATION BY REFERENCE OF REPRESENTATIONS AND CERTIFICATIONS (DEC 2014)

52.209-6 PROTECTING THE GOVERNMENT'S INTEREST WHEN SUBCONTRACTING WITH CONTRACTORS DEBARRED, SUSPENDED, PROPOSED FOR DEBARMENT, OR VOLUNTARILY EXCLUDED (APR 2026)

52.209-9 UPDATES OF PUBLICLY AVAILABLE INFORMATION REGARDING RESPONSIBILITY MATTERS (APR 2026)

52.215-2 AUDIT AND RECORDS-NEGOTIATION (APR 2026)

52.215-8 ORDER OF PRECEDENCE-UNIFORM CONTRACT FORMAT (APR 2026)

52.215-11 PRICE REDUCTION FOR DEFECTIVE CERTIFIED COST OR PRICING DATA-MODIFICATIONS (APR 2026)

52.215-13 SUBCONTRACTOR CERTIFIED COST OR PRICING DATA-MODIFICATIONS (APR 2026)

52.215-21 REQUIREMENTS FOR CERTIFIED COST OR PRICING DATA AND DATA OTHER THAN CERTIFIED COST OR PRICING DATA-MODIFICATIONS (APR 2026)

52.222-19 CHILD LABOR-COOPERATION WITH AUTHORITIES AND REMEDIES (APR 2026)

52.222-50 COMBATING TRAFFICKING IN PERSONS (APR 2026)

52.225-5 TRADE AGREEMENTS (NOV 2023)

52.225-13 RESTRICTIONS ON CERTAIN FOREIGN PURCHASES (FEB 2021)

52.225-14 INCONSISTENCY BETWEEN ENGLISH VERSION AND TRANSLATION OF CONTRACT (FEB 2000)

52.226-8 ENCOURAGING CONTRACTOR POLICIES TO BAN TEXT MESSAGING WHILE DRIVING (MAY 2024)

52.228-4 WORKERS COMPENSATION AND WAR-HAZARD INSURANCE OVERSEAS (APR 1984)

52.228-5 INSURANCE-WORK ON A GOVERNMENT INSTALLATION (JAN 1997)

52.229-6 TAXES-FOREIGN FIXED-PRICE CONTRACTS (DATE)

52.229-12 TAX ON CERTAIN FOREIGN PROCUREMENTS (FEB 2021)

52.232-1 PAYMENTS (APR 1984)

52.232-8 DISCOUNTS FOR PROMPT PAYMENT (FEB 2002)

52.232-11 EXTRAS (APR 1984)

52.232-17 INTEREST (MAY 2014)

52.232-18 AVAILABILITY OF FUNDS (APR 1984)

52.232-22 LIMITATION OF FUNDS (APR 2026)

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52.246-25 LIMITATION OF LIABILITY – SERVICES (FEB 1997)

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52.249-2 TERMINATION FOR CONVENIENCE OF THE GOVERNMENT (FIXED-PRICE) (APR 2012)

52.249-4 TERMINATION FOR CONVENIENCE OF THE GOVERNMENT (SERVICES) (SHORT FORM) (APR 1984)

52.249-8 DEFAULT (FIXED-PRICE SUPPLY AND SERVICE) (APR 1984)

52.253-1 COMPUTER GENERATED FORMS (APR 2026)

I.2 FEDERAL ACQUISITION REGULATION (FAR) CLAUSES INCORPORATED IN FULL TEXT

I.2.1 52.212-4 TERMS AND CONDITIONS—COMMERCIAL PRODUCTS AND COMMERCIAL SERVICES (APR 2026)

(a) *Definitions*. The clause at Federal Acquisition Regulation (FAR) 52.202-1, Definitions, is incorporated by reference.

(b) *Inspection/Acceptance*. The Contractor shall only tender for acceptance those items that conform to the requirements of this contract. The Government reserves the right to inspect or test any supplies or services that have been tendered for acceptance. The Government may require repair or replacement of nonconforming supplies or reperformance of nonconforming services at no increase in contract price. If repair/replacement or reperformance will not correct the defects or is not possible, the Government may seek an equitable price reduction or adequate consideration for acceptance of nonconforming supplies or services. The Government must exercise its post acceptance rights—

(1) Within a reasonable time after the defect was discovered or should have been discovered; and

(2) Before any substantial change occurs in the condition of the item, unless the change is due to the defect in the item.

(c) *Assignment*. The Contractor or its assignee may assign its rights to receive payment due as a result of performance of this contract to a bank, trust company, or other financing institution, including any Federal lending agency in accordance with the Assignment of Claims Act (31 U.S.C. 3727). However, when a third party makes payment (*e.g.,* use of the Governmentwide commercial purchase card), the Contractor may not assign its rights to receive payment under this contract.

(d) *Changes*. Changes in the terms and conditions of this contract may be made only by written agreement of the parties.

(e) *Disputes*. This contract is subject to 41 U.S.C. chapter 71, Contract Disputes. Failure of the parties to this contract to reach agreement on any request for equitable adjustment, claim, appeal, or action arising under or relating to this contract shall be a dispute to be resolved in accordance

with the clause FAR 52.233-1, Disputes, which is incorporated in this contract by reference. The Contractor shall proceed diligently with performance of this contract, pending final resolution of any dispute arising under the contract.

(f) *Excusable delays*. The Contractor shall be liable for default unless nonperformance is caused by an occurrence beyond the reasonable control of the Contractor and without its fault or negligence. Examples of occurrences include acts of God or the public enemy, acts of the Government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, unusually severe weather, and delays of common carriers. When an excusable delay occurs, the Contractor shall—

(1) Notify the Contracting Officer in writing as soon as possible;

(2) Remedy the delay as quickly as possible; and

(3) Notify the Contracting Officer when the occurrence is over.

(g) *Invoice*. The Government will handle invoices according to the Prompt Payment Act (31 U.S.C. 3903) and 5 CFR part 1315. The Contractor shall submit invoices to the address designated in the contract to receive invoices. An invoice must include the information required by 5 CFR part 1315.9(b).

(h) *Patent indemnity*. The Contractor shall indemnify the Government and its officers, employees, and agents against liability, including costs, for actual or alleged direct or contributory infringement of, or inducement to infringe, any United States or foreign patent, trademark, or copyright, arising out of the performance of this contract, provided the Contractor is reasonably notified of such claims and proceedings.

(i) *Payment*—

(1) *Items accepted*. Payment shall be made for items accepted by the Government that have been delivered to the delivery destinations set forth in this contract.

(2) *Prompt payment*. The Government will make payment in accordance with the Prompt Payment Act (31 U.S.C. 3903) and prompt payment regulations at 5 CFR part 1315.

(3) *Discount*. In connection with any discount offered for early payment, time shall be computed from the date of the invoice. For the purpose of computing the discount earned, payment shall be considered to have been made on the date that appears on the

payment check or the specified payment date if an electronic funds transfer payment is made.

(4) *Overpayments*. If the Contractor becomes aware of a duplicate contract financing or invoice payment or that the Government has otherwise overpaid on a contract *financing* or invoice payment, the Contractor shall—

(i) Remit the overpayment amount to the payment office cited in the contract along with a description of the overpayment including the—

(A) Circumstances of the overpayment (*e.g.*, duplicate payment, erroneous payment, liquidation errors, date(s) of overpayment);

(B) Affected contract number and delivery order number, if applicable;

(C) Affected line item or subline item, if applicable;

(D) Contractor point of contact; and

(ii) Provide a copy of the remittance and supporting documentation to the Contracting Officer.

(5) *Interest*.

(i) All amounts that become payable by the Contractor to the Government under this contract shall bear simple interest from the date due until paid unless paid within 30 days of becoming due. The interest rate shall be the interest rate established by the Secretary of the Treasury as provided in 41 U.S.C. 7109, which is applicable to the period in which the amount becomes due, as provided in (i)(6)(v) of this clause, and then at the rate applicable for each six-month period as fixed by the Secretary until the amount is paid.

(ii) The Government may issue a demand for payment to the Contractor upon finding a debt is due under the contract.

(iii) *Final decisions*. The Contracting Officer will issue a final decision as required by FAR part 33 if–

(A) The Contracting Officer and the Contractor are unable to reach agreement on the existence or amount of a debt within 30 days;

(B) The Contractor fails to liquidate a debt previously demanded by the Contracting Officer within the timeline specified in the demand for payment unless the amounts were not repaid because the Contractor has requested an installment payment agreement; or

(C) The Contractor requests a deferment of collection on a debt previously demanded by the Contracting Officer (see FAR part 32).

(iv) If a demand for payment was previously issued for the debt, the demand for payment included in the final decision shall identify the same due date as the original demand for payment.

(v) Amounts shall be due at the earliest of the following dates:

(A) The date fixed under this contract.

(B) The date of the first written demand for payment, including any demand for payment resulting from a termination for cause.

(vi) The interest charge shall be computed for the actual number of calendar days involved beginning on the due date and ending on-

(A) The date on which the designated office receives payment from the Contractor;

(B) The date of issuance of a Government check to the Contractor from which an amount otherwise payable has been withheld as a credit against the contract debt; or

(C) The date on which an amount withheld and applied to the contract debt would otherwise have become payable to the Contractor.

(vii) The interest charge made under this clause may be reduced under the procedures for interest credits prescribed in FAR part 32 in effect on the date of this contract.

(j) *Risk of loss*. Unless the contract specifically provides otherwise, risk of loss or damage to the supplies provided under this contract shall remain with the Contractor until, and shall pass to the Government upon—

(1) Delivery of the supplies to a carrier, if transportation is f.o.b. origin; or

(2) Delivery of the supplies to the Government at the destination specified in the contract, if transportation is f.o.b. destination.

(k) *Taxes*. The contract price includes all applicable Federal, State, and local taxes and duties.

(l) *Termination for the Government's convenience*. The Government reserves the right to terminate this contract, or any part hereof, for its sole convenience. In the event of such termination, the Contractor shall immediately stop all work and shall immediately cause any and all of its suppliers and subcontractors to cease work. Subject to the terms of this contract, the Contractor shall be paid a percentage of the contract price reflecting the percentage of the work performed prior to the notice of termination, plus reasonable charges the Contractor can demonstrate to the satisfaction of the Government using its standard record keeping system, have resulted from the termination. The Contractor shall not be required to comply with the cost accounting standards or contract cost principles for this purpose. This paragraph does not give the Government any right to audit the Contractor's records. The Contractor shall not be paid for any work performed or costs incurred which reasonably could have been avoided.

(m) *Termination for cause*. The Government may terminate this contract, or any part hereof, for cause in the event of any default by the Contractor, or if the Contractor fails to comply with any contract terms and conditions, or fails to provide the Government, upon request, with adequate assurances of future performance. The Government will send a cure notice to the Contractor, unless the reason for the termination is late delivery. In the event of termination for cause, the Government shall not be liable to the Contractor for any amount for supplies or services not accepted, and the Contractor shall be liable to the Government for any and all rights and remedies provided by law. If it is determined that the Government improperly terminated this contract for default, such termination shall be deemed a termination for convenience.

(n) *Title*. Unless specified elsewhere in this contract, title to items furnished under this contract shall pass to the Government upon acceptance, regardless of when or where the Government takes physical possession.

(o) *Warranty*. The Contractor warrants and implies that the items delivered under this contract are merchantable and fit for use for the particular purpose described in this contract.

(p) *Limitation of liability*. Except as otherwise provided by an express warranty, the Contractor will not be liable to the Government for consequential damages resulting from any defect or deficiencies in accepted items.

(q) *Compliance with laws unique to Government contracts*. The Contractor agrees to comply with 31 U.S.C. 1352 relating to limitations on the use of appropriated funds to influence certain Federal contracts; 40 U.S.C. chapter 37, Contract Work Hours and Safety Standards; 41 U.S.C. chapter 87, Kickbacks; 49 U.S.C. 40118, Government-financed air transportation; and 41 U.S.C. chapter 21 relating to procurement integrity.

(r) *Order of precedence*. Any inconsistencies in this solicitation or contract shall be resolved by giving precedence in the following order:

(1) The schedule of supplies/services;

(2) The Disputes, Payments, Invoice, Compliance with Laws Unique to Government Contracts, and Unauthorized Obligations paragraphs of this clause;

(3) Other contract clauses incorporated in the solicitation or contract;

(4) Addenda to this solicitation or contract;

(5) Solicitation provisions incorporated in the solicitation;

(6) Other paragraphs of this clause;

(7) Other documents, exhibits, and attachments; and

(8) The specification.

(s) *Unauthorized obligations*.

(1) Except as stated in paragraph (s)(2) of this clause, when any supply or service acquired under this contract is subject to any End User License Agreement (EULA), Terms of Service (TOS), or similar legal instrument or agreement, that includes any clause requiring the Government to indemnify the Contractor or any person or entity for damages, costs, fees, or any other loss or liability that would create an Anti-Deficiency Act violation (31 U.S.C. 1341), the following shall govern:

(i) Any such clause is unenforceable against the Government.

(ii) Neither the Government nor any Government-authorized end user shall be deemed to have agreed to such clause by

virtue of it appearing in the EULA, TOS, or similar legal instrument or agreement. If the EULA, TOS, or similar legal instrument or agreement is invoked through an "I agree" click box or other comparable mechanism (e.g., "click-wrap" or "browse-wrap" agreements), execution does not bind the Government or any Government authorized end user to such clause.

(iii) Any such clause is deemed to be stricken from the EULA, TOS, or similar legal instrument or agreement.

(2) Paragraph (s)(1) of this clause does not apply to indemnification by the Government that is expressly authorized by statute and specifically authorized under applicable agency regulations and procedures.

(t) *Comptroller General examination of record*. This paragraph applies if this contract was awarded using other than sealed bid procedures and is in excess of the simplified acquisition threshold on the date of award of this contract.

(1) The Comptroller General of the United States, or an authorized representative of the Comptroller General, shall have access to and right to examine any of the Contractor's directly pertinent records involving transactions related to this contract.

(2) The Contractor shall make available at its offices, at all reasonable times, the records, materials, and other evidence for examination, audit, or reproduction, until 3 years after final payment under this contract or for any shorter period specified in FAR part 4, longer period required by statute, or periods specified in other clauses of this contract. If this contract is completely or partially terminated, the records relating to the work terminated shall be made available for 3 years after any resulting final termination settlement. Records relating to appeals under the disputes clause or to litigation or the settlement of claims arising under or relating to this contract shall be made available until such appeals, litigation, or claims are finally resolved.

(3) As used in this clause, records include books, documents, accounting procedures and practices, and other data, regardless of type and regardless of form. This clause does not require the Contractor to create or maintain any record that the Contractor does not maintain in the ordinary course of business or pursuant to a provision of law.

(u) *Incorporation by reference*. The Contractor's representations and certifications, including those completed electronically via the System for Award Management (SAM), are incorporated by reference into the contract.

(End of clause)

I.2.2 ***52.216-18 ORDERING (AUG 2020)***

(a) Any supplies and services to be furnished under this contract shall be ordered by issuance of delivery orders or task orders by the individuals or activities designated in the Schedule. Such orders may be issued from the first day of ongoing performance period through the last day of that performance period.

(b) All delivery orders or tsk orders are subject to the terms and conditions of this contract. In the event of conflict between a delivery order or task order and this contract, the contract shall control.

(c) A delivery order or task order is considered "issued" when –

(4) If sent by mail (includes transmittal by U.S. mail or private delivery service), the Government deposits the order in the mail;

(5) If sent by fax, the Government transmits the order to the Contractor's fax number; or

(6) If sent electronically, the Government either –

(iv) Posts a copy of the delivery order or task order to a Government document access system, and notice is sent to the Contractor; or

(v) Distributes the delivery order or task order via email to the Contractor's email address.

(d) Orders may be issued by methods other than those enumerated in this clause only if authorized in the contract.

(End of clause)

I.2.3 ***52.216-19 Order Limitations (Oct 1995)***

(b) Minimum order. When the Government requires supplies or services covered by this contract in an amount of less than one bi-weekly premium, the Government is not obligated to purchase, nor is the Contractor obligated to furnish those supplies or services under the contract.

(c) Maximum order. The Contractor is not obligated to honor—

(1) Any order for a single item in excess of 2000 employees;

(2) Any order for a combination of items in excess of 2000 employees; or

(3) A series of orders from the same ordering office within fifteen (15) days that together call for quantities exceeding the limitation in subparagraph (1) or (2) above.

(d) If this is a requirements contract (such as, includes the Requirement clause at subsection 52.216-21 of the Federal Acquisition Regulation (FAR)), the Government is not required to order a part of any one requirement from the Contractor if that requirement exceeds the maximum-order limitations in paragraph (b) above.

(e) Notwithstanding paragraphs (b) and (c) above, the Contractor shall honor any order exceeding the maximum order limitations in paragraph (b), unless that order (or orders) is returned to the ordering office within one (1) day after issuance, with written notice stating the Contractor's intent not to provide the item (or items) called for and the reasons. Upon receiving this notice, the Government may acquire the supplies or services from another source.

(End of clause)

I.2.4 ***52.216-21 Requirements (Apr 2026)***

(a) This is a requirements contract for the supplies or services specified, and effective for the period stated, in the Schedule. The quantities of supplies or services specified in the Schedule are estimates only and are not purchased by this contract. Except as this contract may otherwise provide, if the Government's requirements do not result in orders in the quantities described as "estimated" or "maximum" in the Schedule, that fact shall not constitute the basis for an equitable price adjustment.

(b) Delivery or performance shall be made only as authorized by orders issued in accordance with the Ordering clause. Subject to any limitations in the Order Limitations clause or elsewhere in this contract, the Contractor shall furnish to the Government all supplies or services specified in the

Schedule and called for by orders issued in accordance with the Ordering clause. The Government may issue orders requiring delivery to multiple destinations or performance at multiple locations.

(c) Except as this contract otherwise provides, the Government shall order from the Contractor all the supplies or services specified in the Schedule that are required to be purchased by the Government activity or activities specified in the Schedule.

(d) The Government is not required to purchase from the Contractor requirements in excess of any limit on total orders under this contract.

(e) If the Government urgently requires delivery of any quantity of an item before the earliest date that delivery may be specified under this contract, and if the Contractor will not accept an order providing for the accelerated delivery, the Government may acquire the urgently required goods or services from another source.

(f) Any order issued during the ordering period of this contract and not completed within that period shall be completed by the Contractor within the time specified in the order. The contract shall govern the Contractor's and Government's rights and obligations with respect to that order to the same extent as if the order were completed during the contract's ordering period; provided, that the Contractor shall not be required to make any deliveries under this contract after the termination of this contract except for outstanding reimbursement for claims during the term of this contract.

(End of clause)

I.2.5 ***52.217-8 Option to Extend Services (Nov 1999)***

The Government may require continued performance of any services within the limits and at the rates specified in the contract. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within the performance period of the contract.

(End of clause)

I.2.6 ***52.217-9 Option To Extend The Term Of The Contract (Mar 2000)***

(a) The Government may extend the term of this contract by written notice to the Contractor within the performance period of the contract or within 30 days after funds for the option year become available, whichever is later.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed five (5) years.

(End of clause)

I.2.7 ***52.229-12 Tax on Certain Foreign Procurements (Date)***

(a) *Definitions.* As used in this clause—

Foreign person means any person other than a United States person.

United States person, as defined in 26 U.S.C. 7701(a)(30), means–

(1) A citizen or resident of the United States;

(2) A domestic partnership;

(3) A domestic corporation;

(4) Any estate (other than a foreign estate, within the meaning of 26 U.S.C. 7701(a)(31)); and

(5) Any trust if-

(i) A court within the United States is able to exercise primary supervision over the administration of the trust; and

(ii) One or more United States persons have the authority to control all substantial decisions of the trust.

(b) This clause applies only to foreign persons. It implements 26 U.S.C. 5000C and its implementing regulations at 26 CFR 1.5000C-1 through 1.5000C-7.

(c)

(1) If the Contractor is a foreign person and has only a partial or no exemption to the withholding, the Contractor shall include the Department of the Treasury IRS Form W-14, Certificate of Foreign Contracting Party Receiving Federal Procurement Payments, with each voucher or invoice submitted under this contract throughout the period in which this status is applicable. The excise tax withholding is applied at the payment level, not at the contract level. The Contractor should revise each IRS Form W-14 submission to reflect the exemption (if any) that applies to that particular invoice, such as a different exemption applying. In the absence of a completed IRS Form W-14 accompanying a payment request, the default withholding percentage is 2 percent for the

section 5000C withholding for that payment request. Information about IRS Form W-14 and its separate instructions is available via the internet at www.irs.gov/w14.

(2) If the Contractor—

(i) Is a foreign person; and

(ii) Has indicated in its offer in the provision 52.229-11, Tax on Certain Foreign Procurements—Notice and Representation, that it is fully exempt from the withholding; and

(iii) Certified the full exemption on the IRS Form W-14, and if that full exemption no longer applies due to a change in circumstances during the performance of the contract that causes the Contractor to become subject to the withholding for the 2 percent excise tax; then the Contractor shall–

(A) Notify the Contracting Officer within 30 days of a change in circumstances that causes the Contractor to be subject to the excise tax withholding under 26 U.S.C. 5000C; and

(B) Comply with paragraph (c)(1) of this clause.

(d) The Government will withhold a full 2 percent of each payment unless the Contractor claims an exemption. If the Contractor enters a ratio in Line 12 of the IRS Form W-14, the result of Line 11 divided by Line 10, the Government will withhold from each payment an amount equal to 2 percent multiplied by the contract ratio. If the Contractor marks box 9 of the IRS Form W-14 (rather than completes Lines 10 through 12), the Contractor must identify and enter the specific exempt and nonexempt amounts in Line 15 of the IRS Form W-14; the Government will then withhold 2 percent only from the nonexempt amount. See the IRS Form W-14 and its instructions.

(e) Exemptions from the withholding under this clause are described at 26 CFR 1.5000C-1(d)(5) through (7). Any exemption claimed and self-certified on the IRS Form W-14 is subject to audit by the IRS. Any disputes regarding the imposition and collection of the 26 U.S.C. 5000C tax are adjudicated by the IRS as the 26 U.S.C. 5000C tax is a tax matter, not a contract issue.

(f) Taxes imposed under 26 U.S.C. 5000C may not be—

(1) Included in the contract price; nor

(2) Reimbursed.

(g) A taxpayer may, for a fee, seek advice from the IRS as to the proper tax treatment of a transaction. This is called a private letter ruling. Also, the IRS may publish a revenue ruling, which is an official interpretation by the IRS of the Internal Revenue Code, related statutes, tax treaties, and regulations. A revenue ruling is the conclusion of the IRS on how the law is applied to a specific set of facts. For questions relating to the interpretation of the IRS regulations go to https://www.irs.gov/help/tax-law-questions.

(End of Clause)

I.2.8 52.232-19 Availability of Funds for the Next Fiscal Year (Apr 1984)

Funds are not presently available for performance under this contract beyond 30 September of each Government Fiscal Year. The Government's obligation for performance of this contract beyond that date is contingent upon the availability of appropriated funds from which payment for contract purposes can be made. No legal liability on the part of the Government for any payment may arise for performance under this contract beyond 30 September of each Government Fiscal Year, until funds are made available to the Contracting Officer for performance and until the Contractor receives notice of availability, to be confirmed in writing by the Contracting Officer.

(End of clause)

I.2.9 52.237-3 Continuity of Services (Jan 1991)

(a) The Contractor recognizes that the services under this contract are vital to the government and must be continued without interruption and that, upon contract expiration, a successor, either the government or another contractor, may continue them. The Contractor agrees to (1) furnish phase-in training and (2) exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor.

(b) The Contractor shall, upon the Contracting Officer's written notice, (1) furnish phase-in, phase-out services for up to 90 days after this contract expires and (2) negotiate in good faith a plan with a successor to determine the nature and extent of phase-in , phase-out services required. The plan shall specify a training program and a date for transferring responsibilities for each division of work described in the plan and shall be subject to the Contracting Officer's approval. The Contractor shall provide sufficient experienced personnel during the phase-in, phase-out period to ensure that the services called for by this contract are maintained at the required level of proficiency.

(c) The Contractor shall allow as many personnel as practicable to remain on the job to help the successor maintain the continuity and consistency of the

services required by this contract. The Contractor also shall disclose necessary personnel records and allow the successor to conduct on site interviews with these employees. If selected employees are agreeable to the change, the Contractor shall release them at a mutually agreeable date and negotiate transfer of their earned fringe benefits to the successor.

(d) The Contractor shall be reimbursed for all reasonable phase-in, phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract.

(End of clause)

I.3 DEPARTMENT OF STATE ACQUISITION REGULATION (DOSAR)

THE FOLLOWING DOSAR CLAUSES ARE PROVIDED IN FULL TEXT:

I.3.1 Contractor Identification (July 2008)

Contract performance may require contractor personnel to attend meetings with government personnel and the public, work within government offices, and/or utilize government email.

Contractor personnel must take the following actions to identify themselves as non-federal employees:

1) Use an email signature block that shows name, the office being supported and company affiliation (e.g. "John Smith, Office of Human Resources, ACME Corporation Support Contractor");

2) Clearly identify themselves and their contractor affiliation in meetings;

3) Identify their contractor affiliation in Departmental e-mail and phone listings whenever contractor personnel are included in those listings; and

4) Contractor personnel may not utilize Department of State logos or indicia on business cards.

(End of clause)

I.3.2 652.215-70 Examination of Records

(a) With respect to matters related to this contract or a subcontract hereunder, the Department of State Office of the Inspector General, or an authorized representative, shall have upon request:

(1) Complete, prompt, and free access to all Contractor and Subcontractor files (in any format), documents, records, data, premises, and employees, except as limited by law; and

(2) The right to interview any current Contractor and Subcontractor personnel, individually and directly, with respect to such matters.

(b) This clause may not be construed to require the contractor or any subcontractor to create or maintain any record that the contractor or subcontractor does not maintain in the ordinary course of business or pursuant to a provision of law.

(c) The Contractor shall insert a clause containing all the terms of this clause, including this paragraph (c), in all subcontracts under this contract other than acquisitions described in Federal Acquisition Regulation 15.209(b)(1).

I.3.3 652.216-70 Ordering - Indefinite-Delivery Contract (Apr 2004)

The Government shall use one of the following forms to issue orders under this contract:

(a) The Optional Form 347, Order for Supplies or Services, and Optional Form 348, Order for Supplies or Services Schedule - Continuation; or,

(b) The DS-2076, Purchase Order, Receiving Report and Voucher, and DS-2077, Continuation Sheet.

(End of clause)

I.3.4 652.225-71 Section 8(A) of The Export Administration Act of 1979, as Amended (Aug 1999)

(a) Section 8(a) of the U.S. Export Administration Act of 1979, as amended (50 U.S.C. 2407(a)), prohibits compliance by U.S. persons with any boycott fostered by a foreign country against a country which is friendly to the United States and which is not itself the object of any form of boycott pursuant to United States law or regulation. The Boycott of Israel by Arab League countries is such a boycott, and therefore, the following actions, if taken with intent to comply with, further, or support the Arab League Boycott of Israel, are prohibited activities under the Export Administration Act:

(1) Refusing, or requiring any U.S. person to refuse to do business with or in Israel, with any Israeli concern, or with any national or resident of Israel, or with any other person, pursuant to an agreement of, or a request from or on behalf of a boycotting country;

(2) Refusing, or requiring any U.S. person to refuse to employ or otherwise discriminating against any person on the basis of race, religion, sex, or national origin of that person or of any owner, officer, director, or employee of such person;

(3) Furnishing information with respect to the race, religion, or national origin of any U.S. person or of any owner, officer, director, or employee of such U.S. person;

(4) Furnishing information about whether any person has, has had, or proposes to have any business relationship (including a relationship by way of sale, purchase, legal or commercial representation, shipping or other transport, insurance, investment, or supply) with or in the State of Israel, with any business concern organized under the laws of the State of Israel, with any Israeli national or resident, or with any person which is known or believed to be restricted from having any business relationship with or in Israel;

(5) Furnishing information about whether any person is a member of, has made contributions to, or is otherwise associated with or involved in the activities of any charitable or fraternal organization which supports the State of Israel; and,

(6) Paying, honoring, confirming, or otherwise implementing letter of credit which contains any condition or requirement against doing business with the State of Israel.

(b) Under Section 8(a), the following types of activities are not forbidden "compliance with the boycott", and are therefore exempted from Section 8(a)'s prohibitions listed in paragraphs (a)(1) through (6) above:

(1) Complying or agreeing to comply with requirements:

(i) Prohibiting the import of goods or services from Israel or goods produced or services provided by any business concern organized under the laws of Israel or by nationals or residents of Israel; or,

(ii) Prohibiting the shipment of goods to Israel on a carrier of Israel, or by a route other than that prescribed by the boycotting country or the recipient of the shipment;

(2) Complying or agreeing to comply with import and shipping document requirements with respect to the country of origin, the name of the carrier and route of shipment, the name of the supplier of the shipment or the name of the provider of other services, except that no information knowingly furnished or conveyed in response to such requirements may be stated in negative, blacklisting, or similar exclusionary terms, other than with respect to carriers or route of shipments as may be permitted by such regulations in order to comply with precautionary requirements protecting against war risks and confiscation;

(3) Complying or agreeing to comply in the normal course of business with the unilateral and specific selection by a boycotting country, or national or resident thereof, of carriers, insurance, suppliers of services to be performed within the boycotting country or specific goods which, in the normal course of business, are identifiable by source when imported into the boycotting country;

(4) Complying or agreeing to comply with the export requirements of the boycotting country relating to shipments or transshipments of exports to Israel, to any business concern of or organized under the laws of Israel, or to any national or resident of Israel;

(5) Compliance by an individual or agreement by an individual to comply with the immigration or passport requirements of any country with respect to such individual or any member of such individual's family or with requests for information regarding requirements of employment of such individual within the boycotting country; and,

(6) Compliance by a U.S. person resident in a foreign country or agreement by such person to comply with the laws of that country with respect to his or her activities exclusively therein, and such regulations may contain exceptions for such resident complying with the laws or regulations of that foreign country governing imports into such country of trademarked, trade named, or similarly specifically identifiable products, or components of products for his or her own use, including the performance of contractual services within that country, as may be defined by such regulations.

(End of clause)

I.3.5 ***652.229-70 Excise Tax Exemption Statement For Contractors Within The United States (Jul 1988)***

This is to certify that the item(s) covered by this contract is/are for export solely for the use of the U.S. Foreign Service Post identified in the contract schedule.

The Contractor shall use a photocopy of this contract as evidence of intent to export. Final proof of exportation may be obtained from the agent handling the shipment. Such proof shall be accepted in lieu of payment of excise tax.

(End of clause)

I.3.6 ***652.229-71 Personal Property Disposition at Posts Abroad (Aug 1999)***

Regulations at 22 CFR Part 136 require that U.S. Government employees and their families do not profit personally from sales or other transactions with persons who are not themselves

entitled to exemption from import restrictions, duties, or taxes. Should the Contractor experience importation or tax privileges in a foreign country because of its contractual relationship to the United States Government, the Contractor shall observe the requirements of 22 CFR Part 136 and all policies, rules, and procedures issued by the chief of mission in that foreign country.

(End of clause)

I.3.7 ***652.237-72 Observance of Legal Holidays and Administrative Leave (Feb 2015)***

American Holidays:

(a) The Department of State observes the following days as holidays:

New Year's Day
Martin Luther King's Birthday
Washington's Birthday
Memorial Day
Independence Day
Labor Day
Columbus Day
Veterans Day
Thanksgiving Day
Christmas Day
Any other day designated by Federal law, Executive Order, or Presidential Proclamation.

(b) When New Year's Day, Independence Day, Veterans Day or Christmas Day falls on a Sunday, the following Monday is observed; when it falls on Saturday, the preceding Friday is observed. Observance of such days by Government personnel shall not be cause for additional period of performance or entitlement to compensation except as set forth in the contract. If the contractor's personnel work on a holiday, no form of holiday or other premium compensation will be reimbursed either as a direct or indirect cost, unless authorized pursuant to an overtime clause elsewhere in this contract.

(c) When the Department of State grants administrative leave to its Government employees, assigned contractor personnel in Government facilities shall also be dismissed. However, the contractor agrees to continue to provide sufficient personnel to perform round-the-clock requirements of critical tasks already in operation or scheduled, and shall be guided by the instructions issued by the contracting officer or his/her duly authorized representative.

(d) For fixed-price contracts, if services are not required or provided because the building is closed due to inclement weather, unanticipated holidays declared by the President, failure of Congress to appropriate funds, or similar reasons, deductions will be computed as follows:

(1) The deduction rate in dollars per day will be equal to the per month contract price divided by 21 days per month.

(2) The deduction rate in dollars per day will be multiplied by the number of days services are not required or provided. If services are provided for portions of days, appropriate adjustment will be made by the contracting officer to ensure that the contractor is compensated for services provided.

(e) If administrative leave is granted to contractor personnel as a result of conditions stipulated in any "Excusable Delays" clause of this contract, it will be without loss to the contractor. The cost of salaries and wages to the contractor for the period of any such excused absence shall be a reimbursable item of direct cost hereunder for employees whose regular time is normally charged, and a reimbursable item of indirect cost for employees whose time is normally charged indirectly in accordance with the contractor's accounting policy.

Mexican Holidays:

- Anniversary of Mexican Constitution (1st Monday of February)
- Benito Juarez's Birthday (3rd Monday of March)
- Holy Thursday (varies)
- Good Friday (varies)
- Mexican Labor Day (MAY 1st)
- Anniversary of the Battle of Puebla (MAY 5th)
- Mother's Day (MAY 10th)
- Mexican Independence Day (September 16th)
- All Soul's Day (November 2nd)
- Anniversary of Mexican Revolution (3rd Monday of November)
- Our Lady of Guadalupe's Day (if stated in writing by U.S. Embassy's HR section)

(End of clause)

I.3.8 ***652.242-73 Authorization And Performance (Aug 1999)***

(a) The Contractor warrants the following:

(1) That is has obtained authorization to operate and do business in the country or countries in which this contract will be performed;

(2) That is has obtained all necessary licenses and permits required to perform this contract; and,

(3) That it shall comply fully with all laws, decrees, labor standards, and regulations of said country or countries during the performance of this contract.

(b) If the party actually performing the work will be a subcontractor or joint venture partner, then such subcontractor or joint venture partner agrees to the requirements of paragraph (a) of this clause.

I.3.9 ***652.243-70 Notices (Aug 1999)***

Any notice or request relating to this contract given by either party to the other shall be in writing. Said notice or request shall be mailed or delivered by hand to the other party at the address provided in the schedule of the contract. The Contracting Officer must make all modifications to the contract in writing.

(End of clause)

SECTION J – LIST OF EXHIBITS/ATTACHMENTS

J.1 LIST OF EXHIBITS

EXHIBIT A	USG EMPLOYEE STATISTICS
EXHIBIT B	ORE EMPLOYEE RIDER
EXHIBIT C	Payment Registration Form – Pesos
EXHIBIT D	Payment Registration Form – U.S. Dollars – US Bank
EXHIBIT E	Payment Registration Form – U.S. Dollars – Mexican Bank
EXHIBIT F	Guide for NCAGE and SAM Registration
EXHIBIT G	Vendor Portal Registration

J.2 EXHIBIT A – USG EMPLOYEE STATISTICS

J.2.1 EMPLOYEE STATISTICS

J.2.1.1 Employees by Gender within Age Ranges – Regular Employees

FEMALE		MALE	
Age (years)	**Quantity**	**Age (years)**	**Quantity**
18-30	48	18-30	41
31-45	335	31-45	488
46-60	274	46-60	441
61-70	22	61-70	45
+71	1	+71	2
TOTAL	**680**	**TOTAL**	**1017**

J.2.1.2 Employees by Gender within Age Ranges – Bodyguards

FEMALE		MALE	
Age (years)	**Quantity**	**Age (years)**	**Quantity**
18-30	0	18-30	0
31-45	9	31-45	7
46-60	3	46-60	14
61-70	0	61-70	1
+71	0	+71	0
TOTAL	**12**	**TOTAL**	**22**

J.2.2 EMPLOYEE CENSUS

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
18-30	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	5	14	19

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	31	18	49
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	9	6	15
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	2	3	5
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	1	0	1
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	0	0	0
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	0	0	0
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	0	0	0
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	0	0
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	0	0
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	0	0	0
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
31-45	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	13	49	62
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	62	153	215
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	114	118	232
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	63	82	145
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	28	26	54
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	27	21	48
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	14	12	26

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	13	14	27
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	1	3	4
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	2	12	14
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	4	2	6
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	2	2	4
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	1	1	2
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
46-60	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	5	30	35
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	22	142	164
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	58	91	149
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	77	75	152
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	15	27	42
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	45	25	70
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	13	9	22
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	26	24	50
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	2	8	10
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	2	6	8
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	2	6	8
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	6	10	16
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	1	1

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	4	1	5
61-70	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	0	2	2
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	1	18	19
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	7	4	11
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	3	5	8
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	2	3	5
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	3	4	7
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	2	0	2
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	3	2	5
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	1	1
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	1	1
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	1	2	3
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	4	4
+71	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	0	0	0
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	0	0	0
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	1	1	2
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	0	0	0

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	0	0	0
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	0	0	0
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	0	0	0
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	0	0	0
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	0	0
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	0	0
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	0	1	1
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
	TOTAL	**692**	**1039**	**1731**

***Security staff is included in this range.

J.2.3 ***NUMBER OF EMPLOYEES INSURED AND PREMIUM AMOUNTS***

Contract Year****	No. of Employees	Annual Premium	End of Year Revisions	Total
2025 - 2026	1887	5,915,312.20 MXN		5,915,312.20 MXN
2024 - 2025	1775	5,190,181.92 MXN	105,859.27 MXN	5,296,041.19 MXN
2023 - 2024	1666	4,887,751.84 MXN	105,729.27 MXN	4,993,481.11 MXN
2022 - 2023	1631	4,720,000.00 MXN	81,332.86 MXN	4,801,332.86 MXN
2021 - 2022	1592	4,068,669.68 MXN	8,405.90 MXN	4,077,075.58 MXN

J.2.4 ***NUMBER OF LOSSES AND CLAIM AMOUNTS***

Contract Year****	Death	Death Claim Amounts	Permanent Disability	Disability Claim Amounts
2025 - 2026	2	3,518,165	None	None
2024 - 2025	2	2,880,293	None	None
2023 - 2024	3	2,237,395	None	None

2022 - 2023	1	960,429	None	None
2021 - 2022	1	2,402,167	1	787,856

****Contract Year refers to March 1 to February 28.

NOTE TO OFFERORS:

The claims paid by the incumbent contractor are provided for informational purposes only and under no circumstances shall it be construed to change any terms or conditions or requirements within the solicitation. Under no circumstances shall the U.S. Government be liable for this data or shall it become the basis for a request to adjust the premium rates after contract award. Offerors are advised any adjustments to contract premium rates shall be in accordance with the B.6.

J.3 EXHIBIT B – ORE EMPLOYEE STATISTICS

J.3.1 EMPLOYEE STATISTICS

J.3.1.1 Employees by Gender within Age Ranges – Regular Employees

FEMALE		MALE	
Age (years)	**Quantity**	**Age (years)**	**Quantity**
18-30	1	18-30	3
31-45	8	31-45	5
46-60	5	46-60	3
61-70	0	61-70	1
+71	0	+71	0
TOTAL	**14**	**TOTAL**	**12**

J.3.1.2 Employees by Gender within Age Ranges – Bodyguards

FEMALE		MALE	
Age (years)	**Quantity**	**Age (years)**	**Quantity**
18-30	0	18-30	0
31-45	0	31-45	0
46-60	0	46-60	0
61-70	0	61-70	0
+71	0	+71	0
TOTAL	**0**	**TOTAL**	**0**

J.3.2 EMPLOYEE CENSUS

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
18-30	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	0	0	0
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	0	3	3
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	1	0	1
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	0	0	0
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	0	0	0
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	0	0	0
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	0	0	0

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	0	0	0
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	0	0
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	0	0
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	0	0	0
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
31-45	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	3	0	3
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	3	3	6
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	1	1	2
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	0	0	0
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	0	1	1
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	1	0	1
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	0	0	0
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	0	0	0
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	0	0
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	0	0
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	0	0	0
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
46-60	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	3	1	4
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	2	2	4
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	0	0	0
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	0	0	0
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	0	0	0
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	0	0	0
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	0	0	0
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	0	0	0
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	0	0
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	0	0
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	0	0	0
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
61-70	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,000 MXP *5,714.29 - 11,371.43 USD*	0	1	1
	200,000 - 299,000 MXP *11,428.57 - 17,085.71 USD*	0	0	0
	300,000 - 399,000 MXP *17,142.86 - 22,800.00 USD*	0	0	0
	400,000 - 499,000 MXP *22,857.14 - 28,514.29 USD*	0	0	0

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	500,000 - 599,000 MXP *28,571.43 - 34,228.57 USD*	0	0	0
	600,000 - 699,000 MXP *34,285.71 - 39,942.86*	0	0	0
	700,000 - 799,000 MXP *40,000.00 - 45,657.14 USD*	0	0	0
	800,000 - 899,000 MXP *45,714.29 - 51,371.43 USD*	0	0	0
	900,000 - 999,000 MXP *51,428.57 - 57,085.71 USD*	0	0	0
	1,000,000 – 1,099,000 MXP *57,142.86 – 62,800.00 USD*	0	0	0
	1,100,000 – 1,199,000 MXP *62,857.14 – 68,514.29 USD*	0	0	0
	1,200,000 – 1,299,000 MXP *68,571.43 – 74,228.57 USD*	0	0	0
	1,300,000 – 1,399,000 MXP *4,285.71 – 79,942.86 USD*	0	0	0
	1,400,000 – 1,499,000 MXP *80,000.00 – 85,657.14 USD*	0	0	0
+71	**<100,000 MXP** *<5,714.29 USD*	0	0	0
	100,000 - 199,999 MXP *5,714.29 - 11,428.51 USD*	0	0	0
	200,000 - 299,999 MXP *11,428.57 - 17,142.80 USD*	0	0	0
	300,000 - 399,999 MXP *17,142.86 - 22,857.09 USD*	0	0	0
	400,000 - 499,999 MXP *22,857.14 - 28,571.37 USD*	0	0	0
	500,000 - 599,999 MXP *28,571.43 - 34,285.66 USD*	0	0	0
	600,000 - 699,999 MXP *34,285.71 - 39,999.94 USD*	0	0	0
	700,000 - 799,999 MXP *40,000.00 - 45,714.23 USD*	0	0	0
	800,000 - 899,999 MXP *45,714.29 - 51,428.51 USD*	0	0	0
	900,000 - 999,999 MXP *51,428.57 - 57,142.80 USD*	0	0	0
	1,000,000 – 1,099,999 MXP *57,142.86 – 62,857.09 USD*	0	0	0

AGE RANGE	SALARY RANGE Exchange Rate for Calculation Purposes: 17.5 MXP/1 USD	FEMALE	MALE	TOTAL
	1,100,000 – 1,199,999 MXP *62,857.14 – 68,571.37 USD*	0	0	0
	1,200,000 – 1,299,999 MXP *68,571.43 – 74,285.66 USD*	0	0	0
	1,300,000 – 1,399,999 MXP *4,285.71 – 79,999.94 USD*	0	0	0
	1,400,000 – 1,499,999 MXP *80,000.00 – 85,714.23 USD*	0	0	0
	TOTAL	**14**	**12**	**26**

***Security staff is included in this range.

J.3.3 ***NUMBER OF EMPLOYEES INSURED AND PREMIUM AMOUNTS***

Contract Year****	No. of Employees	Annual Premium	End of Year Revisions	Total
2025 - 2026	24	38,925.40 MXN	None	38,925.40 MXN
2024 - 2025	25	36,225.64 MXN	None	36,225.64 MXN
2023 - 2024	23	34,036.24 MXN	None	34,036.24 MXN
2022 - 2023	25	29,764.76 MXN	None	29,764.76 MXN
2021 - 2022	26	6,890.84 MXN	None	6,890.84 MXN

J.3.4 ***NUMBER OF LOSSES AND CLAIM AMOUNTS***

Contract Year****	Death	Death Claim Amounts	Permanent Disability	Disability Claim Amounts
2025 - 2026	None	0.00	None	0.00
2024 - 2025	None	0.00	None	0.00
2023 - 2024	None	0.00	None	0.00
2022 - 2023	None	0.00	None	0.00
2021 - 2022	None	0.00	None	0.00

****Contract Year refers to March 1 to February 28.

NOTE TO OFFERORS:

The claims paid by the incumbent contractor are provided for informational purposes only and under no circumstances shall it be construed to change any terms or conditions or requirements within the solicitation. Under no circumstances shall the U.S. Government be liable for this data or shall it become the basis for a request to adjust the premium rates after contract award. Offerors are advised any adjustments to contract premium rates shall be in accordance with the B.6.

J.4 EXHIBIT C – PAYMENT REGISTRATION FORM – PESOS

Company Information

New Registration of Account ☐ Change of Account ☐

Fiscal Name of the account holder _____
RFC (for Mexican Companies) _____
Name - Point of Contact _____
Telephone Number(s) _____
E-mail Address _____
Company Address _____
_____
_____
_____

Bank information needed for EFT transfers in Pesos, Mexican Currency.

BANK INFORMATION

Bank Name _____
CLABE Interbancaria (18 digits) _____
Currency of Account MXN

If it is a collection account, please include the reference number:

Numeric reference: _____
Alphanumeric reference: _____

_____ _____
Signature Date

FMC approval _____

Note to Offeror: This form has to be signed and attached in PDF format.

J.5 EXHIBIT D – PAYMENT REGISTRATION FORM – U.S. DOLLARS

PAYMENT REGISTRATION
TO A BANK IN THE UNITED STATES
Company Information

New Registration of Account ☐ Change of Account ☐

Name of the account holder _____
Name - Point of Contact _____
Telephone Number _____
E-mail Address _____
Address _____
_____
Unique Entity ID _____
Vendor US Tax ID _____

Bank information needed for EFT transfers in U.S. Dollars to a Bank in the United States

BANK INFORMATION _____
Bank Name _____
Bank Routing Number
(must be 9 digits beginning with a 0,1,2 or 3) _____
Account Number _____
Currency of Account USD

_____ _____
Signature Date

FMC approval _____

Note to Offeror: This form has to be signed and attached in PDF format.

J.6 EXHIBIT E – PAYMENT REGISTRATION – USD TO A BANK IN MEXICO

Company Information

New Registration of Account ☐ Change of Account ☐

Name of the account holder _____
RFC (for Mexican Companies) _____
Name - Point of Contact _____
Telephone Number _____
E-mail Address _____
Address _____
_____
_____
Unique Entity ID _____

Bank information needed for EFT transfers in U.S. Dollars to a U.S. Dollar Bank Account in Mexico.

BANK INFORMATION _____
Bank Name _____
SWIFT Bank Mexico (Different from SWIFT Intermediate Bank) _____
CLABE Interbancaria (18 digits) _____
Currency of Account USD

INTERMEDIATE BANK INFORMATION _____
Bank Name _____
SWIFT Intermediate Bank (Different from SWIFT Bank Mexico) _____

_____ _____
Signature Date

FMC approval _____

Note to Offeror: This form has to be signed and attached in PDF format.

J.7 EXHIBIT F – GUIDE FOR NCAGE & SAM REGISTRATION

J.7.1.1 Background

To be eligible for an award, all prospective Offerors shall have a SAM Unique Entity ID; a Commercial and Government Entity (Cage)/North Atlantic Treaty Organization (NATO) = (NCAGE) Code; and an active registration in System for Award Management (SAM). Refer to FAR 4.605(b).

Vendors have experienced difficulty registering in SAM. One of the most common issues is inaccurate address validation. SAM first validates that addresses entered when requesting NATO Commercial and Government Entities (NCAGE) and unique entity ID match.

Local companies are advised to enter the entity information exactly as shown in the Mexican Constancia de Situación Fiscal without adding S.A. de C.V., S.R.L. or any other type of fiscal regime to prevent issues and delays during the registration.

If SAM.gov cannot validate your entity, you can create a help ticket with the Federal Service Desk at www.fsd.gov.

NOTE: it is very important that each company/entity register with their fiscal company name and address in NCAGE as well as in SAM and without misspelling/typos. The information shall match and be exactly the same on all registrations, if not, the process will take much longer.

J.7.1.2 NATO Commercial and Government Entity (NCAGE) Code:

Foreign entities shall obtain an NCAGE code for each Unique Entity ID they plan to register in SAM, before starting the registration process. Make sure the name and address information provided to obtain the NCAGE code matches that of the Unique Entity ID. Allow up to three (3) business days to receive the NCAGE code.

The direct link NCAGE Request Tool is:

NCAGE Code Request Tool

J.7.1.3 System for Award Management (SAM)

Offerors must register the entity in SAM at – SAM.gov | Entity Registrations

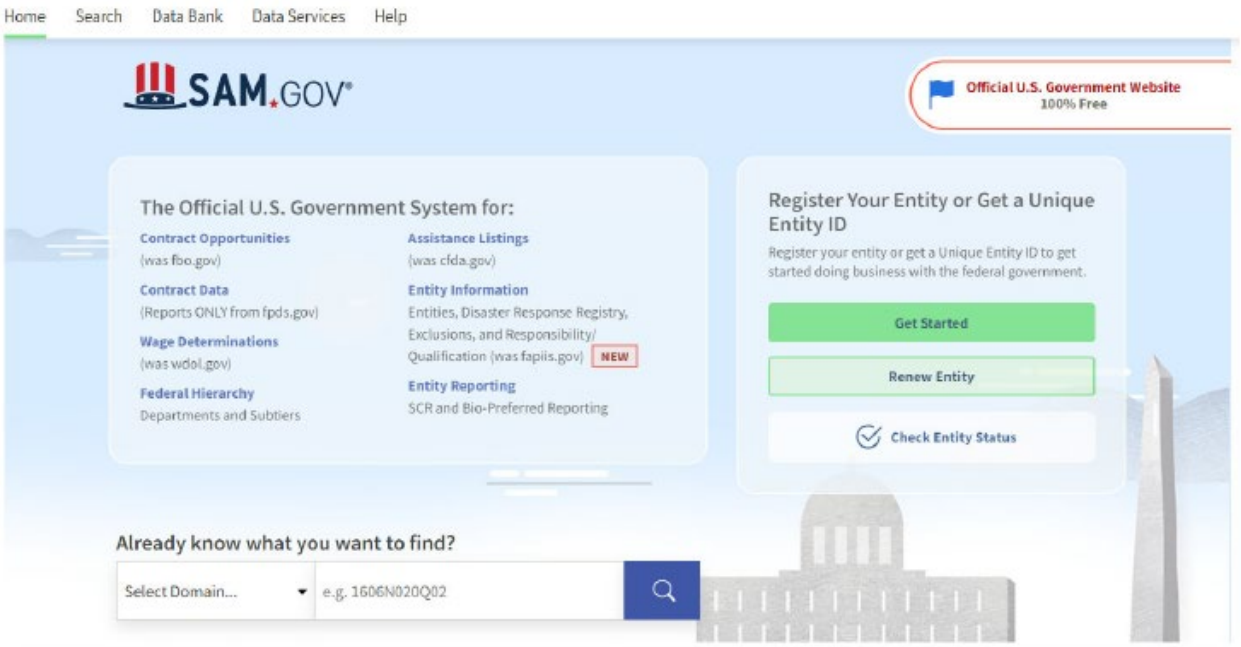
Please allow plenty of time before the contract application deadline. Allow up to 10 business days after submission before the registration is active in SAM.

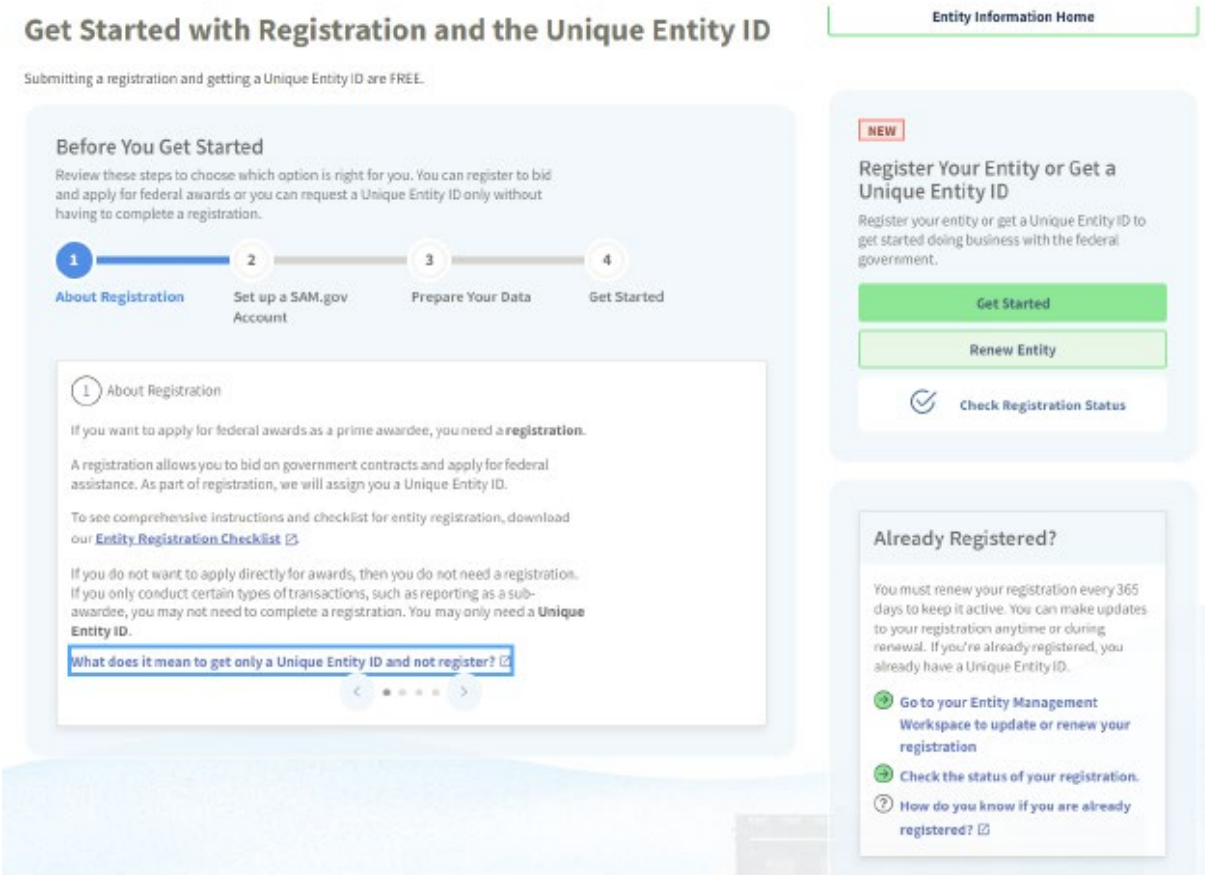
See SAM Entity Registration Checklist to know more about the information that will be requested during your registration.

Watch the following video for additional information:

https://youtu.be/4RSHjczdxq8

Note to Offerors: Opening an account at sam.gov does not mean that you are registered. You need to click on Get Started and follow the system guidance to complete the registration.





J.7.1.4 Frequently Asked Questions

- Do I need a user account?
- What's the difference between signing up and registering?
- What if I already have a login.gov account?
- What do I need to register my entity?

J.8 EXHIBIT G – VENDOR PORTAL REGISTRATION

Vendor Portal registration instructions and guidelines are provided as separate files.

SECTION K – REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF OFFERORS

K.1 **52.203-2 Certificate of Independent Price Determination (Apr 1985)**

(a) The offeror certifies that

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to (i) those prices, (ii) the intention to submit an offer, or (iii) the methods or factors used to calculate the prices offered:

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be certification by the signatory that the signatory –

(1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or

(2)

(i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above

_____ **[Offeror: Insert full name of person(s) in the offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the offeror's organization];**

(ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) above have not participated,

and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above.

(iii) as an agent, has not personally participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above.

(c) if the offeror deletes or modifies subparagraph (a)(2) above, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

(End of provision)

K.2 **52.203-11 Certification And Disclosure Regarding Payments to Influence Certain Federal Transactions (Sep 2024)**

(a) *Definitions*. As used in this provision – "Lobbying contact" has the meaning provided at 2 USC 1602(8). The terms "agency", "influencing or attempting to influence", "officer or employee of an agency", "person", "reasonable compensation", and "regularly employed" are defined in the FAR clause of this solicitation entitled Limitation on Payments to Influence Certain Federal Transactions (52.203-12).

(b) *Prohibition*. The prohibition and exceptions contained in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12) are hereby incorporated by reference in this provision.

(c) *Certification*. The offeror, by signing its offer, hereby certifies to the best of his or her knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a member of Congress on its behalf in connection with the awarding of this contract.

(d) *Disclosure*. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contract on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its officer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.

(e) *Penalty*. Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by 31 USC 1352. Any persons who make an expenditure prohibited under this provision or who fails to file or amend the disclosure required to be filed or amended by this provision, shall be subject to civil penalties as provided in 31 USC 1352.

An imposition of a civil penalty does not prevent the Government from seeking any other remedy that may be applicable.

(End of provision)

K.3 **52.209-2 Prohibition on Contracting with Inverted Domestic Corporations-Representation (Apr 2026)**

(a) Definitions. "Inverted domestic corporation" and "subsidiary" have the meaning given in the clause of this contract entitled Prohibition on Contracting with Inverted Domestic Corporations (52.209-10).

(b) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.

(c) Representation. The Offeror represents that.

(1) It ☐ is, ☐ is not an inverted domestic corporation; and

(2) It ☐ is, ☐ is not a subsidiary of an inverted domestic corporation.

(End of provision)

K.4 **52.209-5 Certification Regarding Responsibility Matters (Apr 2026)**

(a)

(1) The Offeror certifies, to the best of its knowledge and belief, that—

(i) The Offeror and/or any of its Principals—

(A) Are ☐ are not ☐ presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(B) Have ☐ have not ☐, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery,

bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property (if offeror checks "have", the offeror shall also see 52.209-7, if included in this solicitation);

(C) Are ☐ are not ☐ presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision;

(D) Have ☐, have not ☐, within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied. Federal taxes are considered delinquent if both of the following criteria apply:

(1) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.

(2) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(ii) The Offeror has☐ has not ☐, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

(2) "Principal," for the purposes of this certification, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity (*e.g.*, general manager; plant manager; head of a division or business segment; and similar positions).

(b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its

certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the Government will consider the certification in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror non responsible.

(d) This provision does not require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a). The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If the Government later determines that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

(End of provision)

K.5 **52.209-13 Violation of Arms Control Treaties or Agreements-Certification (Apr 2026)**

(a) This provision does not apply to acquisitions at or below the simplified acquisition threshold or to acquisitions of commercial products and commercial services as defined in Federal Acquisition Regulation 2.101.

(b) *Certification*. [*Offeror shall check either (1) or (2).*]

(1) __ The Offeror certifies that–

(i) It does not engage and has not engaged in any activity that contributed to or was a significant factor in the President's or Secretary of State's determination that a foreign country is in violation of its obligations undertaken in any arms control, nonproliferation, or disarmament agreement to which the United States is a party, or is not adhering to its arms control, nonproliferation, or disarmament commitments in which the United States is a participating state. The determinations are described in the most recent unclassified annual report provided to Congress pursuant to section 403 of the Arms Control and Disarmament Act (22

U.S.C. 2593a). The report is available athttps://www.state.gov/bureaus-offices/under-secretary-for-arms-control-and-international-security-affairs/bureau-of-arms-control-verification-and-compliance/; and

(2) __ The Offeror is providing separate information with its offer in accordance with paragraph (d)(2) of this provision.

(c) Procedures for reviewing the annual unclassified report (see paragraph (b)(1) of this provision). For clarity, references to the report in this section refer to the entirety of the annual unclassified report, including any separate reports that are incorporated by reference into the annual unclassified report.

(1) Check the table of contents of the annual unclassified report and the country section headings of the reports incorporated by reference to identify the foreign countries listed there. Determine whether the Offeror or any person owned or controlled by the Offeror may have engaged in any activity related to one or more of such foreign countries.

(2) If such activity might have occurred, review all findings in the report associated with those foreign countries to determine whether or not each such foreign country was determined to be in violation of its obligations undertaken in an arms control, nonproliferation, or disarmament agreement to which the United States is a party, or to be not adhering to its arms control, nonproliferation, or disarmament commitments in which the United States is a participating state. For clarity, in the annual report an explicit certification of non-compliance is equivalent to a determination of violation. However, the following statements in the annual report are not equivalent to a determination of violation:

(i) An inability to certify compliance.

(ii) An inability to conclude compliance.

(iii) A statement about compliance concerns.

(3) If so, determine whether the Offeror or any person owned or controlled by the Offeror has engaged in any activity that contributed to or is a significant factor in the determination in the report that one or more of these foreign countries is in violation of its obligations undertaken in an arms control, nonproliferation, or disarmament agreement to which the United States is a party, or is not adhering to its arms control, nonproliferation, or disarmament commitments in which the United States is a participating state. Review the narrative for any such findings reflecting a

determination of violation or non-adherence related to those foreign countries in the report, including the finding itself, and to the extent necessary, the conduct giving rise to the compliance or adherence concerns, the analysis of compliance or adherence concerns, and efforts to resolve compliance or adherence concerns.

(4) The Offeror may submit any questions with regard to this report by email toNDAA1290Cert@state.gov. To the extent feasible, the Department of State will respond to such email inquiries within 3 business days.

(d) Do not submit an offer unless—

(1) A certification is provided in paragraph (b)(1) of this provision and submitted with the offer; or

(2) In accordance with paragraph (b)(2) of this provision, the Offeror provides with its offer information that the President of the United States has

(i) Waived application under 22 U.S.C. 2593e(d) or (e); or

(ii) Determined under 22 U.S.C. 2593e(g)(2) that the entity has ceased all activities for which measures were imposed under 22 U.S.C. 2593e(b).

(e) *Remedies*. The certification in paragraph (b)(1) of this provision is a material representation of fact upon which reliance was placed when making award. If the Government later determines that the Offeror knowingly submitted a false certification, in addition to other remedies available to the Government, such as suspension or debarment, the Contracting Officer may terminate any contract resulting from the false certification.

(End of provision)

K.6 **<u>52.229-11 Tax on Certain Foreign Procurements—Notice and Representation (Date)</u>**

(a) *Definitions.* As used in this provision—

Foreign person means any person other than a United States person.

Specified Federal procurement payment means any payment made pursuant to a contract with a foreign contracting party that is for goods, manufactured or produced, or services provided in a foreign country that is not a party to an international procurement agreement with the United States. For purposes of the prior sentence, a foreign country does not include an outlying area.

United States person as defined in 26 U.S.C. 7701(a)(30) means—

(1) A citizen or resident of the United States;

(2) A domestic partnership;

(3) A domestic corporation;

(4) Any estate (other than a foreign estate, within the meaning of 26 U.S.C. 701(a)(31)); and

(5) Any trust if—

(i) A court within the United States is able to exercise primary supervision over the administration of the trust; and

(ii) One or more United States persons have the authority to control all substantial decisions of the trust.

(b) Unless exempted, there is a 2 percent tax of the amount of a specified Federal procurement payment on any foreign person receiving such payment. See 26 U.S.C. 5000C and its implementing regulations at 26 CFR 1.5000C-1 through 1.5000C-7.

(c) Exemptions from withholding under this provision are described at 26 CFR 1.5000C-1(d)(5) through (7). The Offeror would claim an exemption from the withholding by using the Department of the Treasury Internal Revenue Service Form W-14, Certificate of Foreign Contracting Party Receiving Federal Procurement Payments, available via the internet at ***www.irs.gov/w14***. Any exemption claimed and self-certified on the IRS Form W-14 is subject to audit by the IRS. Any disputes regarding the imposition and collection of the 26 U.S.C. 5000C tax are adjudicated by the IRS as the 26 U.S.C. 5000C tax is a tax matter, not a contract issue. The IRS Form W-14 is provided to the acquiring agency rather than to the IRS.

(d) For purposes of withholding under 26 U.S.C. 5000C, the Offeror represents that—

(1) It [__]is [__]is not a foreign person; and

(2) If the Offeror indicates "is" in paragraph (d)(1) of this provision, then the Offeror represents that—I am claiming on the IRS Form W-14 [____] a full exemption, or [____] partial or no exemption [*Offeror shall select one*] from the excise tax.

(e) If the Offeror represents it is a foreign person in paragraph (d)(1) of this provision, then—

(1) The clause at FAR 52.229-12, Tax on Certain Foreign Procurements, will be included in any resulting contract; and

(2) The Offeror shall submit with its offer the IRS Form W-14. If the IRS Form W-14 is not submitted with the offer, exemptions will not be applied to any resulting contract, and the Government will withhold a full 2 percent of each payment.

(f) If the Offeror selects "is" in paragraph (d)(1) and "partial or no exemption" in paragraph (d)(2) of this provision, the Offeror will be subject to withholding in accordance with the clause at FAR 52.229-12, Tax on Certain Foreign Procurements, in any resulting contract.

(g) A taxpayer may, for a fee, seek advice from the Internal Revenue Service (IRS) as to the proper tax treatment of a transaction. This is called a private letter ruling. Also, the IRS may publish a revenue ruling, which is an official interpretation by the IRS of the Internal Revenue Code, related statutes, tax treaties, and regulations. A revenue ruling is the conclusion of the IRS on how the law is applied to a specific set of facts. **For questions relating to the interpretation of the IRS regulations go to *https://www.irs.gov/help/tax-law-questions*.**

(End of provision)

K.7 **52.240-90 Security Prohibitions and Exclusions Representations and Certifications (Apr 2026)**

(a) *Definitions*. As used in this provision —

Backhaul, covered article, covered telecommunications equipment or services, critical technology, FASCSA order, Intelligence community, interconnection arrangements, national security system, roaming, sensitive compartmented information, sensitive compartmented information system, source, and substantial or essential component have the meanings provided in the clause 52.240-91, Security Prohibitions and Exclusions.

Business operations means engaging in commerce in any form, including by acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce.

Marginalized populations of Sudan means—

(1) Adversely affected groups in regions authorized to receive assistance under section 8(c) of the Darfur Peace and Accountability Act (Pub. L. 109-344) (50 U.S.C. 1701 note); and

(2) Marginalized areas in Northern Sudan described in section 4(9) of such Act.

Restricted business operations means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007 (Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate—

(1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;

(2) Are conducted under specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;

(3) Consist of providing goods or services to marginalized populations of Sudan;

(4) Consist of providing goods or services to an internationally recognized peacekeeping force or humanitarian organization;

(5) Consist of providing goods or services that are used only to promote health or education; or

(6) Have been voluntarily suspended.

Sensitive technology —

(1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically —

(i) To restrict the free flow of unbiased information in Iran; or

(ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and

(2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

(b) Procedures

(1) *Covered telecommunications and video surveillance*. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) at https://www.sam.gov for entities excluded from receiving federal awards for "covered telecommunications equipment or services."

(2) *FASCSA Orders*.

(i) The Offeror shall search in SAM for the phrase "FASCSA order" for any covered article, or any products or services produced or provided by a source, if there is an applicable FASCSA order described in paragraph (e) of FAR 52.240-91, Security Prohibitions and Exclusions.

(ii) The Offeror shall review the solicitation for any FASCSA orders that are not in SAM but are effective and apply to the solicitation and resultant contract (see FAR 40.204-1(c)(2)).

(iii) FASCSA orders issued after the date of solicitation do not apply unless added by an amendment to the solicitation.

(c) *Covered telecommunications equipment or services representations*. By submission of its offer, the Offeror represents that, after conducting a reasonable inquiry (that looks at any information in the Offeror's possession but does not need to include an internal or third-party audit)—

(1) It will not provide covered telecommunications equipment or services to the Government in the performance of any contract, subcontract or other contractual instrument resulting from this solicitation, except as waived by the solicitation, or as disclosed in paragraph (g); and

(2) It does not use covered telecommunications equipment or services, or use any equipment, system, or service that uses covered telecommunications equipment or services, except as waived by the solicitation, or as disclosed in paragraph (g).

(d) *FASCSA Representation*. By submission of this offer, the offeror represents that it has conducted a reasonable inquiry, and that the offeror does not propose to provide or use in response to this solicitation any covered article, or any products or services produced or provided by a source, if the covered article or the source is prohibited by an applicable FASCSA order in effect on the date the solicitation was issued, except as waived by the solicitation, or as disclosed in paragraph (g). A reasonable inquiry will look at any information in the offeror's possession but does not need to include an internal or third-party audit.

(e) *Sudan certification*. By submission of its offer, the offeror certifies, after conducting a reasonable inquiry(that looks at any information in the offeror's possession but does not need to include an internal or third-party audit), that the offeror does not conduct any restricted business operations in Sudan.

(f) *Iran Representation and Certifications*

(1) Except as provided in paragraph (f)(2) of this provision or if a waiver has been granted in accordance with FAR 40.203-3, the offeror, after conducting a reasonable inquiry (that looks at any information in the offeror's possession but does not need to include an internal or third-party audit), by submission of its offer—

(i) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran;

(ii) Certifies that the offeror, or any person (as defined at section 15 of the Iran Sanctions Act of 1996,Pub. L. 104-172, 50 U.S.C. 1701 note) owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Act. These sanctioned activities are in the areas of development of the petroleum resources of Iran, production of refined petroleum products in Iran, sale and provision of refined petroleum products to Iran, and contributing to Iran's ability to acquire or develop certain weapons or technologies; and

(iii) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds $10,000 with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx)

(2) Exception for trade agreements. The representation and certification requirements of paragraph (f)(1) of this provision do not apply if—

(i) This solicitation includes a trade agreements notice or certification (e.g., 52.225-6, Trade Agreements Certificate); and

(ii) The offeror has certified that all the offered products to be supplied are designated country end products or designated country construction material.

(iii) The offeror shall email questions concerning sensitive technology to the Department of State at CISADA106@state.gov.

(g) *Disclosure*

(1) If the Offeror is not able to represent compliance with the prohibitions in paragraphs (c) or (d), then the Offeror shall disclose within 72 hours to the contracting office identified in paragraph (g)(2) the following information for each product or service not compliant:

(i) Contract number and order number, if applicable;

(ii) Identification of whether this disclosure relates to paragraph (c) on covered telecommunication equipment or services, or to paragraph (d) on FASCSA orders;

(iii) A description of the products or services that the Contractor identifies or has reason to suspect is prohibited (include brand; model number, such as the original equipment manufacturer (OEM) number, manufacturer part number, or wholesaler number; and item description, as applicable);

(iv) The entity that produced the product or service (include entity name, unique entity identifier, Contractor and Government Entity (CAGE) code, facilities responsible for design, fabrication, assembly, packaging, and test of the product, and whether the entity was the OEM or a distributor (provide manufacturer codes and distributor codes used for the product));

(v) Description of the functionality of the product or service and how that functionality impacts the risk to the product or service;

(vi) An explanation of any factors relevant to determining if the product or service should be permitted by an applicable exception, exemption, or waiver (if the offeror would like the Government to consider a waiver);

(vii) Whether alternative products or services are available that would be compliant with the prohibition;

(viii) If the product or service is related to item maintenance, include the following information on the item being maintained:

(A) Brand;

(B) Model number, OEM number, manufacturer part number, or wholesaler number; and

(C) Item description, as applicable.

(ix) Any readily available information about mitigation actions undertaken or recommended.

(2) If a disclosure is required to be submitted to a contracting office, the offeror shall submit the disclosure as follows:

(i) If a Department of Defense contracting office, the offeror shall submit the disclosure to the website at https://dibnet.dod.mil.

(ii) For all other contracting offices, the Offeror shall submit the disclosure to the Contracting Officer.

(3) If the disclosure provided does not contain any of the information required by paragraph (1), and the Offeror later discovers new information that is required by paragraph (1), then the Offeror shall submit a subsequent disclosure within 72 hours of discovering the new information.

(h) *Executive agency review of disclosures*. The Contracting Officer will review disclosures provided in paragraph (g) to determine if any applicable waiver may be sought. The Contracting Officer may choose not to pursue a waiver and may instead make an award to an Offeror that does not require a waiver.

(End of provision)

K.8 AUTHORIZED CONTRACT ADMINISTRATOR

If the offeror does not fill-in the blanks below, the official who signed the offer will be deemed to be the offeror's representative for Contract Administration, which includes all matters pertaining to payments.

Name:	

Address:	
Telephone Number:	

K.9 **THE FOLLOWING FAR CLAUSES ARE PROVIDED BY REFERENCE:**

52.203-18 PROHIBITION ON CONTRACTING WITH ENTITIES THAT REQUIRE CERTAIN INTERNAL CONFIDENTIALITY AGREEMENTS OR STATEMENTS – REPRESENTATION (JAN 2017)

K.10 **THE FOLLOWING DOSAR PROVISIONS ARE PROVIDED IN FULL TEXT:**

K.10.1 ***652.225-70 Arab League Boycott of Israel (Aug 1999)***

(a) Definitions. As used in this provision:

Foreign person means any person other than a United States person as defined below.

United States person means any United States resident or national (other than an individual resident outside the United States and employed by other than a United States person), any domestic concern (including any permanent domestic establishment of any foreign concern), and any foreign subsidiary or affiliate (including any permanent foreign establishment) of any domestic concern which is controlled in fact by such domestic concern, as provided under the Export Administration Act of 1979, as amended.

(b) Certification. By submitting this offer, the offeror certifies that it is not:

(1) Taking or knowingly agreeing to take any action, with respect to the boycott of Israel by Arab League countries, which Section 8(a) of the Export Administration Act of 1979, as amended (50 U.S.C. 2407(a)) prohibits a United States person from taking; or,

(2) Discriminating in the award of subcontracts on the basis of religion.

(End of provision)

SECTION L – INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS

The Offeror shall submit a completed IRS Form W-14, found at www.irs.gov/w14, to ensure compliance with FAR 52.229-11

L.1 SUBMISSION OF OFFERS

This solicitation is for the provision of insurance and services described in Sections C and J, under the terms and conditions set forth herein. Offerors shall submit proposals for two distinct pricing methodologies: B.2.5 Salary-Based Rates and B.2.6 Age-Based Rates.

L.2 SUMMARY OF INSTRUCTIONS

Each proposal must consist of the following separate volumes:

Volume	Title
I	**General Documentation** (a) Executed Standard Form 33, Solicitation Offer and Award. (b) Exhibits C, D, or E, Payment Registration Form (as applicable). (c) NCAGE/CAGE number (d) SAM Unique Entity ID. (e) Proof of active SAM registration. (f) Section K (g) W-14
II	**Price Proposal** completed in Section B, Prices to include: (a) Salary-Based Rates (B.2.5). (b) Age-Based Rates (B.2.6). (c) Retention Amount for Salary-Based Premiums (B.5.3.1). (d) Retention Amount for Age-Based Premiums (B.5.3.2).
III	**Technical Proposal** (e) PART 1 – Life Insurance Services (f) PART 2 – Understanding of the Requirement (g) PART 3 – Experience and Past Performance (h) PART 4 – Licensing Information
IV	**Financial Statements**

L.3 DELIVERY OF PROPOSALS AND EXCEPTIONS TO SOLICITATION.

L.3.1 Submission Date & Address

The offeror shall submit the complete offer to the e-mail address indicated below no later than ***Wednesday, July 29, 2026, at 12:00 hours,*** local time:

MexicoCityGSOSolicitations@groups.state.gov

L.3.2 Deviations to Solicitation Requirements

The offeror shall identify and explain/justify any deviations, exceptions, or conditional assumptions taken to any of the instructions or requirements of this solicitation in the appropriate volume of the offer.

L.3.3 Proprietary Data

Proprietary data shall be specifically identified by page(s), paragraph(s) and sentence(s), and shall not be generalized.

L.4 CONTENTS OF PROPOSALS

The proposals shall contain documents filled out in strict conformance with the detailed instructions set forth as follows:

L.4.1 Volume 1: General Documentation

(a) A completed solicitation, in which the SF-33 cover page (blocks 12 through 18, as appropriate).

(b) Exhibits C, D or E, Payment Registration Form (as applicable), filled out and signed (see Section B.2.2, Currency).

(c) NCAGE/CAGE number

(d) SAM Unique Entity ID.

(e) Proof of active SAM registration.

(f) A completed Section K, Representations, Certifications, and Other Statements of Offerors.

(g) If your offer is from one of the excepted countries a W-14 form shall be provided with your offer.

https://www.irs.gov/forms-pubs/about-form-w-14

https://www.irs.gov/instructions/iw14

L.4.2 ***Volume 2: Price Proposal***

(a) The price proposal shall consist of completion of Section B. Prices shall be all-inclusive, i.e., the Offeror shall provide fully loaded rates, including but not limited to all direct and indirect labor costs, policy issuance costs, fee for quarterly payment, all overhead and profit, as well as any and all general and administrative expenses (G&A), equipment, and any other expense related to the services required in this Solicitation, during the entire period of performance. Price proposal shall include:

(1) Salary-Based Rates for the base year (B.2.5.1).

(2) Salary-Based Rates for the option years (B.2.5.2-B.2.5.5). A price proposal for an option year with no proposal for the base year will not be considered, nor will a proposal for a base period which does not include a proposal for all option periods

(3) Salary-Based Rates for the 52.217-8 Extension (B.2.5.6).

(4) Age-Based Rates for the base year (B.2.6.1).

(5) Age-Based Rates for the option years (B.2.6.2-B.2.6.5). A price proposal for an option year with no proposal for the base year will not be considered, nor will a proposal for a base period which does not include a proposal for all option periods

(6) Age-Based Rates for the 52.217-8 Extension(B.2.6.6).

(b) As stated in letter (a) above, prices are to be all inclusive, therefore any cost related to policy issuance, partial (non-annual) payments, or any other additional charge must be included in the premium rate. No additional charges will be accepted.

L.4.2.1 ***Retention Amounts***

L.4.2.1.1 Definition of Retention Amount

As stated in section B.5.1, the retention amount is the portion of the premium that will not be allocated to the payment of claims. Instead, it represents the amount the contractor estimates will be used for other costs, such as overhead, general and administrative expenses, and similar expenditures.

L.4.2.1.2 Entry of Retention Amount

(a) The retention amount that the offeror must enter in section B.5.3 shall be the unit retention amount calculated per period, per premium, and per category.

(b) This amount must be expressed in the currency of the offer and shall not be presented as a percentage.

L.4.3 ***Volume 3: Technical Proposal***

The technical proposal must be submitted in four separate parts as described below.

L.4.3.1 ***Life Insurance Benefit Levels***

Section C.1 defines the required minimum benefits and corresponding coverages. These are the minimally acceptable levels of coverage. ***If offerors choose to include additional benefits or higher coverages than the required minimums this is acceptable; however, the initial evaluation will be based on meeting the stated minimums.*** For each benefit listed, proposals must clearly state its coverage. ***Any proposal that reduces a benefit definition or offers lower than the minimum required coverage may be determined technically unacceptable.*** The resultant contract will contain the actual proposed coverages or increased benefit offerings if they exceed the solicitation's minimum requirements.

L.4.3.1.1 Multiple proposals

If an offeror has multiple plans available that meet or exceed the minimum benefit levels and wants to propose them, a separate proposal with its respective prices must be submitted individually for each.

L.4.3.1.2 Suggested format

It's the offeror's responsibility to ensure their proposal is clear and meets all requirements. An example of an acceptable format for Part 1 is to submit a table that lists the Section C benefit definitions in one column and in the adjoining column list the proposed coverage.

L.4.3.2 ***Understanding of the Requirement***

The offeror shall demonstrate it understands the solicitation requirements and has an acceptable approach to managing the contract. This may be shown through corporate literature, life insurance brochures, reports, surveys and other narrative descriptions of its internal systems. Proposals must provide clear and adequate responses to each of the following criterion:

a) Provide evidence that the offeror operates an established business with a permanent address and telephone listing providing its taxpayer identification card (Cédula de Identificación Fiscal), or plans to establish an office within 30 days of contract award.

b) Evidence that the offeror/quoter can provide the necessary personnel, equipment, and financial resources needed to perform the work.

c) Describe the offeror's knowledge, history, and familiarity in providing life insurance to groups of employees.

d) Describe how the offeror plans to perform the contract, especially as it relates to:

(1) Providing the insurance.

(2) Maintaining adequate reserves to pay claims, including accounting procedures.

(3) Administering and prompt payment of insured claims.

(4) Procedures for reviewing claims (including where and how claims will be processed and settled).

(5) Providing periodic reporting and accounting of financial results of the plan, including reporting formats.

(6) The overall management of the contract.

e) Provide the resume/CV of the person who will be responsible for managing this contract, and who will be the first point-of-contact for the Embassy. This person shall be able to acceptably communicate all matters related to this contract in English; and have a minimum of two years' experience in the local or international insurance industry with customers having similar requirements to include magnitude of personnel.

f) Provide the quality assurance plan the offeror will use under this contract. This plan should describe the: schedule of regular internal meetings to discuss issues and performance; schedule of monthly or quarterly surveys and/or communications via email to customers to solicit feedback on performance and discuss issues; and schedule of quarterly or semi-annual plans to review performance and discuss issues with Embassy officials.

g) Any Offeror that will subcontract insurance services shall provide a duly signed letter from the subcontracted company's legal representative stating the acceptance of the Terms and Conditions of this Contract.

L.4.3.3 Experience and Past Performance

a) Describe the offeror's claims workflow system and timeframes at each processing point to fully process claims (from initial receipt to final settlement).

b) Describe the offeror's customer service system and mechanism for receiving and promptly addressing customer inquiries and complaints.

c) The offeror must list all contracts and subcontracts it has held over the past three (3) years for the same or similar work. Provide the following information for each contract and subcontract:

(1) Current or previous customer's organization name, address, email address, and telephone number for whom similar insurance and services were provided.

(2) Identifying contract number, when (period of performance), and where the insurance was provided.

(3) Type of insurance provided, and range of population covered, as well as total dollar amount.

(4) Brief description of and comparability to the work required under this solicitation.

(5) Brief description of any performance problems and how they were resolved.

d) Provide the most recent results of customer satisfaction surveys, if available.

e) Provide the screenshot of the score for "IDATU" for Life insurance (preferably collective group) under CONDUSEF (Comisión Nacional para la Protección y Defensa de los Usuarios de Servicios Financieros)/Buro de Entidades Financieras (for local insurance companies).

L.4.3.4 Licensing Information

a) The offeror shall include a notarized copy of the most current license/certificate/-accreditation, which demonstrates that the offeror is licensed/certified/accredited or otherwise authorized by the Government of Mexico or its agent (e.g., insurance commission, board) to provide life insurance coverage to persons (to include organizations, companies, groups) within the host country. If the offeror is not licensed/certified/accredited or otherwise authorized by the Government of Mexico, it must demonstrate that it is licensed/certified/accredited by a government other than Mexico to provide life insurance for persons in Mexico and must demonstrate its capacity to provide health benefits in Mexico to meet the minimum requirements and other conditions set forth in this solicitation.

b) This section shall demonstrate that the offeror is licensed/certified/accredited through no less than the final day of the base performance period and that the offeror is eligible for renewal for the option periods. This section shall also summarize and describe any probationary, disciplinary or actions taken upon the offeror, which are in force or are about to be imposed upon the offeror by the Government of Mexico or its agents.

c) Failure to demonstrate that the offeror is an authorized insurance company permitted to write and administer life insurance policies in Mexico shall be grounds for rejection of the proposal.

L.4.3.4.1 Profit Sharing Credit

The offeror shall indicate whether any insurance plan offered will be subject to participation in any profit sharing credit program, pooling agreement (including multinational agreements) or any other premium credit procedure. If this is applicable, please describe. This is for evaluation only to distinguish between

otherwise equally priced, technically acceptable proposals and will not be considered in determining the lowest-priced offeror.

L.4.4 ***Volume 4: Financial Statements***

The offeror shall provide a current statement of its financial condition, certified by a third party that includes:

a) Income (profit-loss) Statement that shows profitability for the past three years;

b) Balance Sheet that shows the assets owned and the claims against those assets, or what a firm owns and what it owes for the past three years; and

c) Cash Flow Statement that shows the firm's sources and uses of cash for the past three years. This will help the U.S. Government assess a firm's ability to pay its obligations.

The U.S. Government will use this information to determine the offeror's financial responsibility and ability to perform under the contract. Failure of an offeror to comply with a request for this information may cause the U.S. Government to determine the offeror to be non-responsible.

L.5 52.252-1 Solicitation Provisions Incorporated By Reference (Feb 1998)

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. In addition, the full text of a clause may be accessed electronically at Acquisition.gov this address is subject to change.

If the Federal Acquisition Regulation (FAR) is not available at the location indicated above, use the Department of State Acquisition website at e-CFR to see the links to the FAR. You may also use an Internet "search engine" (for example, Google, Yahoo or Excite) to obtain the latest location of the most current FAR.

THE FOLLOWING FEDERAL ACQUISITION REGULATION PROVISIONS ARE INCORPORATED BY REFERENCE:

PROVISION	TITLE AND DATE
52.204-7	SYSTEM FOR AWARD MANAGEMENT—REGISTRATION (APR 2026)
52.209-7	INFORMATION REGARDING RESPONSIBILITY MATTERS (APR 2026)
52.214-34	SUBMISSION OF OFFERS IN ENGLISH LANGUAGE (APR 1991)
52.215-1	INSTRUCTIONS TO OFFERORS-COMPETITIVE ACQUISITION (APR 2026)
52.222-56	CERTIFICATION REGARDING TRAFFICKING IN PERSONS COMPLIANCE PLAN (APR 2026)

L.6 SOLICITATION PROVISIONS INCLUDED IN FULL TEXT

L.6.1 52.212-1 INSTRUCTIONS TO OFFERORS—COMMERCIAL PRODUCTS AND COMMERCIAL SERVICES (APR 2026)

(a) *Submission of offers*. Submit signed and dated offers to the office specified in this solicitation at or before the exact time specified in this solicitation. As a minimum, offers shall include—

(1) The solicitation number;

(2) The name, address, telephone number of the Offeror;

(3) The Offeror's Unique Entity Identifier (UEI) and, if applicable, Electronic Funds Transfer (EFT) indicator;

(4) Information necessary to evaluate the factors contained in the provision at 52.212-2 or as described in the solicitation;

(5) Responses to provisions that require Offeror completion of information, representations, and certifications (other than those collected via the System for Award Management (SAM)); and

(6) A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and any solicitation amendments.

(b) *Period for acceptance of offers*. The Offeror agrees to hold the prices in its offer firm for 180 calendar days from the date specified for receipt of offers, unless another time period is specified in an addendum to the solicitation.

(c) *Late submissions, modifications, revisions, and withdrawals of offers*.

(1) Offerors are responsible for submitting offers and any modifications or revisions to the Government office designated in the solicitation by the time specified in the solicitation.

(2) Any offer, modification, or revision received after the time specified for receipt of offers is "late" and will not be considered unless it is received before award is made and the Contracting Officer determines that accepting the late offer would not unduly delay the acquisition. However, a late modification of an otherwise successful offer that makes its terms more favorable to the Government will be considered at any time it is received and may be accepted.

(3) If an emergency or unanticipated event interrupts normal Government processes so that offers cannot be received at the Government office designated for receipt of offers by the exact time specified in the solicitation, and urgent Government requirements preclude amendment of the solicitation or other notice of an extension of the closing date, the time specified for receipt of offers will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal Government processes resume.

(4) Offerors may withdraw their offers by written notice to the Government received at any time before award.

(d) *Contract award* (not applicable to Invitation for Bids). The Government intends to evaluate offers and award a contract without discussions with Offerors. Therefore, the Offeror's initial offer should contain the Offeror's best terms. However, the Government reserves the right to conduct discussions, if necessary. The Government may reject any or all offers if such action is in the public interest, accept other than the lowest offer, and waive informalities and minor irregularities in offers received.

(e) *Debriefings*. If a post-award debriefing is given to requesting Offerors, the Government will disclose the following information, if applicable:

(1) The agency's evaluation of the significant weak or deficient factors in the debriefed Offeror's offer.

(2) The overall evaluated cost or price and technical rating of the successful Offeror and the debriefed Offeror and past performance information on the debriefed Offeror.

(3) The overall ranking of all Offerors when any ranking was developed by the agency during source selection.

(4) A summary of the rationale for award.

(5) For acquisitions of commercial products, the make and model of the product to be delivered by the successful Offeror.

(6) Reasonable responses to relevant questions posed by the debriefed Offeror as to whether the agency followed source-selection procedures set forth in the solicitation, applicable regulations, and other applicable authorities.

(End of provision)

L.6.2 ***52.212-2 EVALUATION—COMMERCIAL PRODUCTS AND COMMERCIAL SERVICES (APR 2026)***

(a) *Evaluation factors*. The Government will award a contract resulting from this solicitation to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, price and other factors considered. The following factors will be used to evaluate offers:

See Section M, Evaluation Factors for Award.

(b) *Options* (if applicable). The Government will evaluate offers for award purposes by adding the total price for all options to the total price for the basic requirement. The Government may determine that an offer is unacceptable if the option prices are significantly unbalanced. The evaluation of options does not obligate the Government to exercise the option(s).

(c) *Notice of award*. A written notice of award or acceptance of an offer furnished to the successful Offeror within the time for acceptance specified in the offer, shall result in a binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer (or part of an offer), whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award.

(End of provision)

L.6.3 ***52.216-1 TYPE OF CONTRACT (APR 1984)***

The Government contemplates award of a requirements type contract that contains fixed prices with economic price adjustment, resulting from this solicitation. The quantities shown in Section B are estimates only and the Government is not obligated to order the estimated quantities shown in this section.

(End of provision)

L.6.4 ***Economic Price Adjustment***

See B.6 for information relating to the economic price adjustment features of this contract.

L.6.5 ***52.233-2 SERVICE OF PROTEST (APR 2026)***

(a) Protests, as defined in section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the General Accounting Office (GAO) shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from the Head of Contracting Activity of the U.S. Embassy Mexico City.

(b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

(End of provision)

L.7 **652.206-70 ADVOCATE FOR COMPETITION/OMBUDSMAN (FEB 2015)**

(a) The Department of State's Advocate for Competition is responsible for assisting industry in removing restrictive requirements from Department of State solicitations and removing barriers to full and open competition and use of commercial items. If such a solicitation is considered competitively restrictive or does not appear properly conducive to competition and commercial practices, potential offerors are encouraged first to contact the contracting office for the solicitation. If concerns remain unresolved, contact:

(1) For solicitations issued by the Office of Acquisition Management (A/LM/AQM) or a Regional Procurement Support Office, the A/LM/AQM Advocate for Competition, at AQMCompetitionAdvocate@state.gov.

(2) For all others, the Department of State Advocate for Competition at cat@state.gov.

(b) The Department of State's Acquisition Ombudsman has been appointed to hear concerns from potential offerors and contractors during the pre-award and post-award phases of this acquisition. The role of the ombudsman is not to diminish the authority of the contracting officer, the Technical Evaluation Panel or Source Evaluation Board, or the selection official. The purpose of the ombudsman is to facilitate the communication of concerns, issues, disagreements, and recommendations of interested parties to the appropriate Government personnel, and work to resolve them. When requested and appropriate, the ombudsman will maintain strict confidentiality as to the source of the concern. The ombudsman does not participate in the evaluation of proposals, the source selection process, or the adjudication of formal contract disputes. Interested parties are invited to contact the contracting activity ombudsman the Minister Counselor for Management Affairs, at telephone number 5080-2800. For an American Embassy or overseas post, refer to the numbers below for the Department Acquisition Ombudsman. Concerns, issues, disagreements, and recommendations which cannot be resolved at a contracting activity level may be referred to the Department of State Acquisition Ombudsman at (703) 516-1696 or write to: Department of State, Acquisition Ombudsman, Office of Global Acquisitions (M/GA), Suite 1060, SA-15, Washington, DC 20520.

(End of provision)

L.8 PRE-PROPOSAL CONFERENCE

L.8.1 Date and Time

A pre-proposal conference to discuss the requirements of this solicitation will be held on ***Wednesday, May 27, 2026, at 12:00 hours, local time.*** Prospective offerors/quoters should contact the Contracting team at MexicoCityGSOSolicitations@groups.state.gov for additional information.

L.9 QUESTIONS & ANSWERS

Oral questions will not be answered. Questions related to this Solicitation shall be submitted in writing and in **English** language. All questions shall refer to the page number, section, paragraph, and sentence of the solicitation to prevent confusions.

L.9.1 Questions and Answers Before the Pre-Proposal Conference

Offerors are urged to submit written questions at least three (3) days before the scheduled pre-proposal conference date using the email address below:

MexicoCityGSOSolicitations@groups.state.gov

L.9.2 Questions at the Pre-Proposal Conference

The Government will try to answer all questions submitted before the Pre-Proposal Conference. Attendees may also ask additional questions at the pre-proposal conference; however, if any answer requires further research, there is no guarantee that the question will be answered at the visit.

L.9.3 Government Statements at the Pre-Proposal Conference

The Government's statements at the pre-proposal conference shall not be considered to be a change to the solicitation unless a written amendment is issued.

L.9.4 Deadline to Submit Questions

The deadline to submit a question is ***Wednesday, June 3, 2026, before 12:00 hours (noon)***, local time.

L.9.5 Posting of Questions and Answers

Following the questions deadline, questions and answers will be posted on SAM.gov (https://sam.gov/content/opportunities). All prospective offerors will be able to download all questions presented in writing prior, during and after the pre-proposal conference, along with answers. If the answer requires a change to the solicitation, a solicitation amendment will also be issued and posted.

SECTION M – EVALUATION FACTORS FOR AWARD

M.1 EVALUATION OF PROPOSALS

M.1.1 General

To be acceptable and eligible for evaluation, proposals must be prepared in accordance with Section L - Instructions, Conditions and Notices to Offerors, and must meet all the requirements set forth in the other sections of this solicitation. Acceptable proposals will be evaluated pursuant to this section, and award shall be made as set forth in M.3 below.

The Government may determine an offeror to be unacceptable and exclude it from further consideration for failure to comply with Section L.

M.2 TYPE OF CONTRACT

The Government intends to establish a single award indefinite delivery indefinite quantity contract that includes a one-year base year plus four (4) one-year options, resulting from this solicitation to the responsible contractor whose quotation conforms to the solicitation and represents the best value to the Government, price and other factors considered utilizing FAR 15 Comparative Evaluation.

M.3 AWARD WITHOUT DISCUSSIONS

In accordance with FAR provision 52.215-1 (included in Section L of this RFP), offerors are reminded that the Government may award this contract based on initial proposals and without negotiation, pursuant to FAR 15.203. Therefore, the offeror's initial offer should contain the offeror's best terms from a price and technical standpoint. The Government reserves the right to enter into negotiations with companies in the competitive range if there is a need to do so pursuant to FAR 15.204.

M.4 SELECTION PROCESS

This selection process will utilize FAR 15 procedures.

After preliminary consideration of all offers, the Department will no longer consider offers that do not meet basic standards to be eligible for award. The offers that remain will be subject to a comparative evaluation.

M.5 PRELIMINARY EVALUATION PROCESS

The preliminary evaluation process shall include the following:

M.5.1 Compliance Review

The Government will perform an initial review of proposals/quotations received to determine completeness and compliance with the terms of the solicitation. The Government may deem as unacceptable proposals/quotations that do not conform to the solicitation. Offers must provide

evidence that minimum technical requirements as expressed in Section C, Description / Specification / Work Statement are met as a condition to entering into the comparative evaluation phase of the acquisition.

M.6 COMPARATIVE EVALUATION

A comparative evaluation is defined as the act of comparing two or more offers in response to the RFP. The item-by-item comparison is performed by comparing each offer to directly to one another to determine which provides the best value to the Government utilizing **technical, past performance criteria and price** as described below. **This is NOT a low price technically acceptable process. This solicitation neither requires nor prohibits the selection of the lowest priced acceptable offers.**

M.7 EVALUATION CRITERIA

M.7.1 Technical

Technical requirements will be evaluated on the basis of a direct comparison to other offers to discern if there is any kind of technical quality superiority that would support an award to a higher priced offer. Technical discriminators by requirement may include:

Evaluation Criteria	**Minimum Technical Requirements**
Death Benefit	
(1) Natural Death:	32x monthly basic salary. Payment within 60.
(2) Accidental Death:	46x monthly basic salary Payment within 60.
Disability Benefit	
(1) Total Permanent Disability:	40x monthly basic salary. within 60 days from the date they receive the initial ST-4 form “Dictamen de Invalidez” issued by the Instituto Mexicano del Seguro Social.
Participants Covered Under a Rider	ORE coverage is confirmed.

Evaluation Criteria	Minimum Technical Requirements
Established business	Evidence that the offeror operates an established business with a permanent address and telephone listing providing its taxpayer identification card (Cédula de Identificación Fiscal)
Personnel, equipment, and financial resources	Evidence that the offeror/quoter can provide the necessary personnel, equipment, and financial resources needed to perform the work.
Management Approach	Provide their plan to perform explaining how adequate reserves to pay claims will be maintained, including accounting procedures.
Payment and claim management.	Provide their plan for prompt payment of insured claims. Procedures for reviewing claims.
Periodic Reporting	Provide their plan to submit reports and reporting formats.
Project Manager	Resume and contact information of the designated Project Manager.
Quality Assurance	Evidence of appropriate quality assurance procedures.
Claims Workflow System	Description of claims workflow system and timeframes.
Customer Service System	Description of customer service system and mechanism for receiving and promptly addressing customer inquiries and complaints
Experience	Proven experience over the past three (3) years for the same or similar work.
Customer Satisfaction	Most recent results of customer satisfaction surveys
IDATU Score	"IDATU" for Life insurance (preferably collective group) under CONDUSEF (Comisión Nacional para la Protección y Defensa de los Usuarios de Servicios Financieros)/Buro de Entidades Financieras is over 8.

Evaluation Criteria	Minimum Technical Requirements
Licensing	Proof of licenses to provide Life Insurance services in Mexico.
Conditions & Limitations	Exclusions for war, certain activities, substance use, suicide, etc.

M.7.2 Past Performance

Past performance will be evaluated on the basis of a direct comparison to other offers to discern if there is any significant past performance superiority that would support an award to a higher priced offer. Past performance as a discriminator may be appropriate where based on the offeror's performance record, the Government has a high expectation that the offeror will successfully perform the required effort.

M.7.3 Price

Price will be evaluated to ensure the proposed price is fair and reasonable. The Government will determine which pricing strategy – Salary-Based or Age-Based – provides the best value.

The Government will evaluate prices for all technically acceptable offerors to determine the total evaluated price proposed by each offeror.

The "total evaluated price" is the cumulative total of the base year insurance plus all option years plus the additional 6-month extension per FAR 52.217-8, for the total estimated quantity specified in Section B.5. The Government reserves the right to reject proposals that are unreasonably low or high in price.

The "total evaluated price" will **not** include any Rider pricing.

M.7.3.1 Fixed Prices

Offerors must propose fixed prices for the coverage identified in Section B – Prices. Proposals that do not include fixed prices cannot be evaluated for the total requirement and will be rejected.

M.7.3.2 Separate Charges

Separate charges, in any form, are not solicited. For example, proposals containing any charges for failure of the Government to exercise any options will be rejected. The Government shall not be obligated to pay any charges other than the contract price, including any exercised options.

M.7.4 Responsibility

The Government will make a responsibility determination by analyzing whether the apparent successful offeror complies with the requirements of FAR subpart 9.1, including:

Adequate financial resources or the ability to obtain them;

Ability to comply with the required performance period, taking into consideration all existing commercial and governmental business commitments;

Satisfactory record of integrity and business ethics;

Necessary organization, experience, and skills or the ability to obtain them;

Necessary equipment and facilities or the ability to obtain them; and

Be otherwise qualified and eligible to receive an award under applicable laws and regulations.

M.8 ORAL PRESENTATIONS

The Government reserves the right to conduct Oral Presentations in accordance with FAR 15.105-1 with those offerors who are in the competitive range. If the Government exercises this right, offerors in the competitive range will be invited to participate in oral presentation, at no cost to the Government on the date and location set by the Government in order to give an oral presentation to augment their proposal.

M.9 52.217-5 Evaluation of Options (Apr 2026)

The Government will evaluate offers for award purposes by adding the estimated total price for all options to the total price for the basic requirement. Evaluation of options will not obligate the Government to exercise the option(s).

M.10 52.225-17 Evaluation Of Foreign Currency Offers (Feb 2000)

If the Government receives offers in more than one currency, the Government will evaluate offers by converting the foreign currency to United States currency using the exchange rate used by the Embassy in effect as follows:

(a) For acquisitions conducted using sealed bidding procedures, on the date of bid opening.

(b) For acquisitions conducted using negotiation procedures—

(1) On the date specified for receipt of offers, if award is based on initial offers; otherwise

(2) On the date specified for receipt of proposal revisions.

GENERAL COMMENTS: Yellow highlighting is used throughout this solicitation to draw attention to critical instructions, mandatory submission elements, and key compliance requirements. Offerors should carefully review all highlighted content, as it is intended to support clarity and ensure responsiveness to the solicitation. The highlighting does not imply evaluation weighting unless explicitly stated in Section M.