

¡ATENCIÓN!

Empresas de Tecnología, IA, Datos y Desarrollo de Software

El Departamento de Desarrollo Económico y Comercio (DDEC) anuncia la Solicitud de Propuestas RFP-DDEC-FY2026-003 para la contratación de servicios profesionales para el diseño e implementación de un Chatbot Bilingüe con Inteligencia Artificial, integrado al Single Business Portal (SBP), la Plataforma de Incentivos y otros servicios ofrecidos por el DDEC, con el objetivo de mejorar la experiencia y el servicio a ciudadanos y empresarios, ofreciendo respuestas rápidas, precisas y accesibles 24/7.

Disponibilidad de Guías:

A partir del **martes, 20 de enero de 2026**, por solicitud vía correo electrónico y en la página web oficial del DDEC: propuestas@ddec.pr.gov
(Indicar en el asunto: RFP-DDEC-FY2026-003)
www.desarrollo.pr.gov

Entrega de propuestas:

En o antes del **viernes, 13 de febrero de 2026 a las 11:59 p.m. (AST)**, vía correo electrónico a: propuestas@ddec.pr.gov (No se concederán excepciones)

Si cuentas con experiencia comprobada en IA conversacional, desarrollo de chatbots, integración de plataformas, ingeniería de datos y cumplimiento normativo, esta es una oportunidad para colaborar en la transformación digital del DDEC y proyectos estratégicos de impacto para Puerto Rico.



ATTENTION!

Technology, AI, Data, and Software Development Companies

The Puerto Rico Department of Economic Development and Commerce (PRDEDC) announces Request for Proposals RFP-DDEC-FY2026-003 for the procurement of professional services to design and implement a bilingual, AI-powered chatbot, integrated into the Single Business Portal (SBP), the Incentives Platform, and other services offered by PRDEDC, with the goal of improving the experience and service for citizens and businesses by providing fast, accurate, and accessible responses 24/7.

Guidelines Availability:

Starting **Tuesday, January 20, 2026**, by email request and on the official PRDEDC website: **propuestas@ddec.pr.gov**
(Subject line: RFP-DDEC-FY2026-003)
www.desarrollo.pr.gov

Proposal Submission:

By or before **Friday, February 13, 2026, at 11:59 PM AST**, via email to:
propuestas@ddec.pr.gov (No exceptions will be granted)

If you have proven experience in conversational AI, chatbot development, platform integration, data engineering, and regulatory compliance, this is an opportunity to collaborate on PRDEDC's digital transformation and strategic projects that impact Puerto Rico.





PRDEDC Intelligent Conversational Chatbot for All Service Offerings

RFP-DDEC-FY2026-003

PRDEDC is seeking a strategic technology partner to develop and deploy a user-centric chatbot within six months that provides clear and accessible information about permits, incentives, and other service offered by PRDEDC.



DEPARTMENT OF ECONOMIC

DEVELOPMENT
AND COMMERCE

GOVERNMENT OF PUERTO RICO

Table of Contents

| | | |
|----------|--|-----------|
| 1 | Introduction and Background | 3 |
| 1.1 | Overview of the Puerto Rico Department of Economic Development and Commerce..... | 3 |
| 1.2 | Legal Basis and Authority..... | 3 |
| 1.3 | Institutional Context and Strategic Transformation | 3 |
| | Alignment with PRDEDC’s Priorities | 4 |
| 1.4 | Purpose of this RFP | 5 |
| 2 | Strategic Objectives..... | 5 |
| 2.1 | Strategic Objectives | 5 |
| 2.2 | Expected Outcomes | 6 |
| 2.3 | Guiding Principles for Implementation | 6 |
| 3 | Scope of Work / Statement of Work..... | 7 |
| 3.1 | General Description | 7 |
| 3.2 | Service Domains (Work Areas) | 8 |
| 3.2.1 | Domain 1 – Intelligent Conversational Agent (Permits & Incentives) | 8 |
| 3.2.2 | Domain 2 – Documentation & Knowledge Enablement | 10 |
| 3.2.3 | Domain 3 – Security, Compliance & AI Governance | 10 |
| 3.3 | Integration Requirement..... | 11 |
| 3.4 | Project Management and Coordination Requirement..... | 12 |
| 4 | Principles of Execution and Service Standards | 13 |
| 4.1 | Performance and Coordination Principles..... | 13 |
| 4.2 | Service Standards and Availability..... | 13 |
| 4.3 | Transparency and Accountability..... | 13 |
| 4.4 | Deliverable Review and Continuous Improvement..... | 14 |
| 5 | Mandatory Requirements and Proposal Submission..... | 14 |
| 5.1 | Mandatory Requirements | 14 |
| 6 | Proposal Evaluation and Scoring Criteria | 16 |
| 6.1 | Evaluation Process Overview | 16 |
| 6.2 | Evaluation Criteria and Weighting | 17 |
| 6.3 | In-Person Strategic Presentation Session | 17 |

| | | |
|-----------|--|-----------|
| 6.4 | Cost Plan Evaluation | 18 |
| 6.5 | Final Selection and Award..... | 19 |
| 7 | Proposal Format and Submission Requirements | 21 |
| 7.1 | General Instructions..... | 21 |
| 7.2 | Proposal Organization and Structure..... | 22 |
| 7.3 | Cost Plan – Budget breakdown and pricing structure | 24 |
| 7.4 | Submission Method and Deadline..... | 25 |
| 7.5 | Receipt of Proposals | 26 |
| 7.6 | Errors and Omissions in Proposals..... | 26 |
| 7.7 | Clarifications and Modifications | 27 |
| 7.8 | Confidentiality and Proprietary Information | 27 |
| 8 | RFP Acquisition..... | 27 |
| 8.1 | RFP Documents Acquisition | 27 |
| 8.2 | Allowed and Prohibited Communications | 28 |
| 9 | Contact & Schedule | 28 |
| 9.1 | Official Contact..... | 28 |
| 9.2 | RFP Schedule and Key Dates | 28 |
| 10 | Annex A..... | 29 |

1 Introduction and Background

1.1 Overview of the Puerto Rico Department of Economic Development and Commerce

The Puerto Rico Department of Economic Development and Commerce (PRDEDC) is the principal executive branch agency responsible for promoting and facilitating economic growth, competitiveness, and innovation throughout Puerto Rico. Established under Reorganization Plan No. 4 of 1994, as amended, the PRDEDC leads the Government of Puerto Rico's economic development strategy through its integrated programs, incentives, and initiatives designed to attract investment, foster entrepreneurship, and strengthen local industries.

Through its various divisions and affiliated entities, the PRDEDC serves as the central coordinating body for economic transformation, overseeing industrial promotion, commercial development, incentives management, and strategic policy implementation to advance Puerto Rico's long-term prosperity.

1.2 Legal Basis and Authority

This Request for Proposals (RFP-DDEC-FY2026-003) is issued under the authority granted by Reorganization Plan No. 4 of 1994, as amended, which establishes the organizational and operational framework of the Puerto Rico Department of Economic Development and Commerce (PRDEDC). It is also consistent with the policy framework established under Act No. 60-2019, known as the Puerto Rico Incentives Code, which consolidates and regulates the island's economic development initiatives.

The procurement process shall comply with all applicable Puerto Rico laws, regulations, and executive instruments governing the contracting of professional services by public entities, including Executive Order 2021-029, Circular Letter No. 013-2021 issued by the Office of the Comptroller of Puerto Rico and the *"Procedimiento Interno para la Evaluación y Selección de Proveedores de Servicios Profesionales cuya cuantía sea de \$250,000 o más, y aquellos de menor cuantía cuando así se determine por el Departamento de Desarrollo Económico y Comercio (DDEC) y sus Entidades Operacionales y Adscritas Oficina de Asesoramiento Legal"*.

1.3 Institutional Context and Strategic Transformation

The Puerto Rico Department of Economic Development and Commerce (PRDEDC) is advancing a comprehensive digital modernization initiative aimed at improving service delivery and enabling data-driven decision-making. As part of this effort, the Department seeks to enhance user interaction and accessibility within the Single Business Portal (SBP),

the Incentives Platform, the PRDEDC website, and other relevant touchpoints by implementing a bilingual, AI-powered conversational chatbot.

Within this strategic context, the implementation of a bilingual, AI-powered intelligent conversational chatbot represents a critical component of PRDEDC's vision to enhance operational efficiency, reduce processing times, and improve user experience. The chatbot will serve as the primary digital resource hub to support citizens and stakeholders' assistance when needed.

To maximize accessibility and user engagement, the chatbot will be embedded across multiple touchpoints, including:

- The Single Business Portal (SBP)
- The Incentives Platform
- The PRDEDC website
- Messaging platforms such as WhatsApp, ensuring users can interact through familiar channels.

Alignment with PRDEDC's Priorities

The strategy resulting from this RFP must align with PRDEDC's key strategic priorities, which include:

1. **Modernization and Streamlining of Permitting Processes:** In line with Executive Orders OE-2025-009, OE-2025-002 the Department is committed to reforming the permitting system to make it more agile, transparent, and predictable. This includes offering resources to better guide and assess proponents through the permitting application process.
2. **Maximizing the Puerto Rico Incentives Code (Act 60):** Ensure that incentives are accessible, transparent, and efficiently managed through digital tools that reduce backlog and accelerate economic activation.
3. **Attracting and Retaining Investment:** Position Puerto Rico as a competitive hub for global trade, manufacturing, and innovation by leveraging its strategic location and robust infrastructure.
4. **Empowering SMEs and Local Talent:** Provide tools and resources that enable small and medium-sized enterprises to grow, while fostering workforce development and retaining young professionals on the island.
5. **Digital Transformation and Data-Driven Governance:** Improving access and efficiency through a bilingual chatbot in SBP, the Incentives Platform, and other touchpoints. Built-in analytics will provide insights for better decisions and transparency.

6. **Customer-Centric Service Delivery:** Design and deliver economic development services around the needs of businesses, investors, and entrepreneurs by simplifying processes, improving transparency, and leveraging digital tools to reduce friction, increase predictability, and enhance the overall user experience across all PRDEDC touchpoints.

1.4 Purpose of this RFP

Through this RFP, PRDEDC seeks a strategic partner; a multidisciplinary, highly experienced technology firm or consortium, to design, develop, and implement a bilingual, AI-powered chatbot within six (6) months. The chatbot will be embedded in the Single Business Portal (SBP), the Incentives Platform, and other relevant touchpoints, providing clear guidance on permits, regulatory requirements, and all available incentives.

The selected partner must deliver a milestone-driven plan that ensures measurable progress at every stage. The approach should leverage advanced conversational AI technologies with strong governance and guardrails to ensure accuracy, accessibility, and sustainability.

Proposals must address all service areas and functional requirements outlined in this RFP, including. Partial or fragmented proposals will not be considered. Beyond technical implementation, the selected partner must enable PRDEDC to manage content and workflows independently, ensuring long-term efficiency and institutional capacity building.

2 Strategic Objectives

2.1 Strategic Objectives

This RFP seeks to advance PRDEDC's digital transformation by improving service delivery, user experience, and data-driven decision-making. The following strategic objectives define the priorities guiding all proposed activities:

1. **Deliver Better User Experience:** Offer intuitive self-service with clear pathways to human assistance when needed.
2. **Enhance PRDEDC Platforms:** Deploy a bilingual, AI-powered chatbot that prioritizes clarity, ease of use, and accessibility.
3. **Improve Efficiency:** Streamline permitting and incentives processes by providing relevant, contextual, and actionable guidance through the chatbot.
4. **Enable Data-Driven Decisions:** Use chatbot analytics to improve services and strengthen governance.
5. **Ensure Sustainability:** Establish documentation and governance for long-term maintenance and encourage UX innovation to improve public service delivery.

2.2 Expected Outcomes

The successful implementation of this RFP is expected to result in measurable outcomes, including but not limited to:

1. Increased Applications

- Grow permit and incentive applications by 15–20% through clear, proactive guidance and simplified steps.
- Reduce drop-offs during application by providing conversational support and field-level explanations.

2. Improved User Satisfaction

- Achieve Net Promoter Score (NPS) increase of 20 points within the first year.
- Maintain Customer Satisfaction (CSAT) $\geq 4/5$ through intuitive, bilingual interactions.

3. Enhanced Accessibility

- Provide 24/7 self-service across SBP, Incentives Platform, website, and messaging channels (e.g., WhatsApp).
- Ensure WCAG 2.1 AA compliance for inclusive access.

4. Better Accuracy

- Reduce incomplete or incorrect applications by 30–40% through guided interactions and contextual validation.

5. Actionable Insights

- Use chatbot analytics to identify common pain points and improve processes continuously.

2.3 Guiding Principles for Implementation

All deliverables implemented under this RFP shall adhere to the following guiding principles:

- **Integration:** All components shall form part of a unified, cohesive framework that aligns with the overall objectives and scope of the chatbot.
- **Transparency:** Activities shall reflect the highest ethical and professional standards, ensuring clarity, accuracy, and accountability in every stage of execution.

- **Data-Driven Decision Making:** Reporting and performance monitoring shall be grounded in measurable indicators, analytics, and real-time insights.
- **Accessibility and Inclusion:** All outputs and services shall ensure equitable access, including bilingual support (Spanish/English) and compliance with accessibility standards (WCAG 2.1), considering cultural and demographic diversity.
- **Innovation:** The proposal shall demonstrate the application of advanced technologies and methodologies, including AI, machine learning, automation, and modern digital platforms to accelerate delivery and improve outcomes.
- **Sustainability:** Solutions must be designed for long-term maintainability, including comprehensive documentation and modular architecture to support future enhancements.
- **Collaboration:** The contractor must work closely with PRDEDC's specialized teams and partner entities, fostering strong internal coordination, clear alignment on priorities, and shared accountability to ensure cohesive execution and effective delivery of economic development initiatives.
- **Continuous Improvement:** Processes and tools should incorporate feedback loops and iterative enhancements to optimize performance and user experience over time.

3 Scope of Work / Statement of Work

3.1 General Description

The selected contractor shall provide professional services in conversational AI implementation, knowledge base development, user experience design, and security/compliance to support PRDEDC's objectives. Services must be delivered through a collaborative, milestone-driven approach that ensures efficiency and alignment with PRDEDC's priorities.

Proposed activities and deliverables should:

- Embed a bilingual (Spanish/English), AI-powered chatbot into SBP, the Incentives Platform, and other touchpoints such as the website, WhatsApp, and additional relevant channels.
- Improve access to permits, incentives, and all the PRDEDC service offerings.
- Reduce errors and incomplete applications through guided interactions.
- Provide analytics for data-driven decision-making.
- Include documentation and governance for long-term sustainability.

Proposals must clearly describe the approach, integration framework, methodology, staffing plan, and measurable impact indicators. Demos, examples, and case studies showing proven success and ROI are strongly encouraged.

3.2 Service Domains (Work Areas)

The Scope of Work is organized into three (3) primary service domains. Each domain includes:

- A description of required services,
- The expected deliverables, and
- A Bidder Response Guide to orient the structure of the proposer's submission.

Note: The deliverables listed under each service domain are provided solely for reference and expectation-setting. They illustrate the type and scope of outputs PRDEDC anticipates after contract award. **Proposers are not required to submit these deliverables as part of their proposal.** Instead, their technical submission should focus on demonstrating the capacity, methodology, and organizational approach to effectively produce such outputs once engaged by PRDEDC.

Proposers must clearly indicate how service domains will integrate with one another to ensure narrative and operational consistency across the project's overall objectives. If activities span multiple departments or partner entities, proposers must describe how each domain's work will align with related initiatives led by other PRDEDC divisions.

3.2.1 Domain 1 – Intelligent Conversational Agent (Permits & Incentives)

Required Services:

- Design and implement a bilingual (Spanish/English) AI-powered chatbot for SBP, the Incentives Platform, and other touchpoints, connecting it with key areas and channels such as the website, WhatsApp, and other relevant platforms.
- Ensure WCAG 2.1 accessibility compliance and responsive design.
- Provide accurate, context-aware guidance on permits, incentives, and any other service offering.
- Include admin tools for content governance and version control.
- Implement AI guardrails to prevent misinformation and bias.
- AI models should include automatic multilingual support (50+ languages, as in ChatGPT 4.0) without extra cost. Architecture must allow future multilingual expansion.

Minimum Capabilities:

A. Virtual Assistant & User Intake

- Welcome users upon entry into SBP, Incentives Platform, or other relevant platforms.
- Conduct conversational intake to understand:
 - Type of business or economic activity
 - Construction or permitting needs
 - Location, sector, and operational characteristics
- Provide clear, plain-language explanations of applicable processes.

B. Permits & Construction Guidance

- Guide users on required permits or approvals.
- Explain dependencies, documentation, and next steps.

C. Incentives & Decrees Orientation

- Pre-screen for potential eligibility for incentives and decrees.
- Communicate requirements, documentation, and disclaimers (not legal or financial advice).

D. Application Assistance

- Assist users in completing applications with step-by-step guidance.
- Reduce incomplete or incorrect submissions.

E. Human Escalation & Case Creation

- When automation cannot resolve:
 - Create a service case with full conversation context for follow-up within 24–48 hours, or
 - Enable appointment scheduling with PRDEDC personnel.

F. Status Tracking & Notifications

- Allow users to check request status.
- Communicate pending actions and resolution milestones.

Expected Deliverables:

- Conversation flow design and UX specifications.

- MVP chatbot deployed in a test environment.
- Admin console for content updates.
- UAT report and production deployment plan.

Bidder Response Guide:

- Describe chatbot architecture, knowledge management approach (e.g., RAG), multilingual strategy, and hallucination mitigation.
- Provide examples of similar public-facing assistants and KPIs achieved.

3.2.2 Domain 2 – Documentation & Knowledge Enablement

Required Services:

- Map business processes and dependencies for permits and incentives.
- Develop a structured knowledge base for permits, incentives, and related processes.
- Create comprehensive documentation for chatbot architecture, integrations, and workflows.
- Establish governance processes for content updates and version control.
- Implement a maintainable knowledge base for future updates.

Expected Deliverables:

- Workflow documentation and process maps, including requirement documentation based on transaction type and user-provided information. Proper documentation is essential for the chatbot's effective operation.
- Knowledge base and maintenance plan to ensure ongoing accuracy and performance.
- Documentation for architecture, workflows, and integration points for transparency and future scalability.

Bidder Response Guide:

- Explain methodology (e.g., knowledge graphs, NLP-assisted doc generation).
- Provide examples of documentation modernization projects.

3.2.3 Domain 3 – Security, Compliance & AI Governance

Required Services:

- Implement compliance-first approach aligned with NIST, PR Ley 40, PRITS, ISO/IEC 42001, FTC guidelines.
- Establish AI governance: risk register, content guardrails, adversarial testing, and monitoring.

Expected Deliverables:

- Policies and procedures for AI governance and security.
- Risk register and incident response playbooks.
- Monthly compliance dashboards and KPIs reports.
- Chatbot accuracy must meet $\geq 90\%$ factual correctness in UAT before production.
- Bias testing and adversarial testing reports must be submitted quarterly.
- Knowledge Transfer and Training (Mandatory): The Proposer shall include a formal knowledge transfer and training plan for Agency-designated personnel, focused on the long-term operation, administration, and maintenance of the solution following deployment and implementation.
 - The plan shall include technical documentation, hands-on training sessions, and delivery of materials necessary to ensure operational continuity and reduce reliance on external support services.

Bidder Response Guide:

- Detail compliance frameworks used, audit mechanisms, and prior certifications.
- Provide examples of AI governance programs deployed for public entities.

3.3 Integration Requirement

All proposals must address every service domain described above and present an integrated strategy demonstrating how these services will operate cohesively to support PRDEDC's priorities.

Integration Requirements:

- The chatbot must be natively embedded within SBP.
- Integrations may include permitting systems, incentive platforms, case management tools, and appointment scheduling systems, only as necessary for chatbot functionality.
- All integrations must use secure APIs and existing authentication mechanisms.

Proposals that do not clearly demonstrate inter-domain integration, measurable outcomes, and narrative alignment with PRDEDC's priorities may receive lower technical evaluation scores.

3.4 Project Management and Coordination Requirement

The selected contractor must appoint a dedicated Project Manager who will serve as the primary point of contact with PRDEDC's team. This individual will be accountable for timely coordination, quality control, and delivery of all required reports and materials under this contract.

Key Responsibilities of the Project Manager:

- Lead and oversee planning, execution, and performance monitoring across all service domains.
- Maintain continuous communication with PRDEDC's Contract Officer and designated project lead.
- Facilitate approval workflows, ensuring compliance with PRDEDC's internal review protocols.
- Coordinate subcontractors and vendors as needed to meet established timelines and deliverables.

Post-Implementation Support Requirement: The contractor must plan and budget for post-launch support, including:

- Hypercare period for stabilization immediately after go-live.
- Ongoing maintenance and monitoring with defined SLAs, QA processes, and performance tracking. These services must be explicitly detailed in the Cost Plan to ensure transparency and continuity.
- Knowledge Transfer and Training: Provide a plan for training Agency personnel on long-term operation, administration, and maintenance of the solution, including technical documentation and essential materials to ensure continuity and reduce reliance on external support.

Project Manager Qualifications:

- Demonstrated experience managing government technology projects of similar scale and complexity, preferably within the public or economic development sectors.
- Proven ability to coordinate multidisciplinary teams and ensure compliance with regulatory and governance standards.

4 Principles of Execution and Service Standards

All services under this RFP are expected to be delivered within a framework of excellence, transparency, and full regulatory compliance, in accordance with the laws and regulations of the Government of Puerto Rico and applicable federal provisions. Proposals should demonstrate how the proposer's approach will uphold these principles and ensure effective coordination with PRDEDC.

4.1 Performance and Coordination Principles

Proposers are expected to design their service approach around the following principles:

- **Performance reporting:** Clear monthly performance reports that include measurable progress indicators, documented outcomes, and variance analysis against milestones.
- **Continuous coordination:** Ongoing communication mechanisms with PRDEDC's specialized team and affiliated entities, ensuring consistency and alignment across all initiatives.
- **Flexibility and adaptability:** Ability to adjust priorities, timelines, and tactics in response to economic developments, emerging opportunities, or changes in public policy.
- **Capacity & knowledge transfer:** Commitment to strengthening PRDEDC's internal capabilities through manuals, operational guides, training sessions, and structured knowledge transfer to ensure sustainability beyond the contract term.
- **Partnership mindset:** The contractor must act as a strategic partner, bringing global best practices and innovative approaches that exceed minimum requirements.

4.2 Service Standards and Availability

Proposals should clearly outline how service delivery will meet the following standards:

- **Availability:** Regular business hour coverage with extended availability to address urgent or time-sensitive matters when required.
- **Responsiveness:** Prompt acknowledgment and handling of PRDEDC requests or feedback.
- **Coordination:** Structured internal processes to ensure timely communication, document sharing, and approvals.

4.3 Transparency and Accountability

Proposers should describe how transparency and accountability will be embedded in all aspects of project management and reporting. This includes documentation of deliverables, progress tracking, and internal mechanisms that ensure traceability and integrity throughout execution.

4.4 Deliverable Review and Continuous Improvement

Proposals should describe how expected deliverables will be reviewed, approved, and tracked for quality assurance. PRDEDC encourages proposers to include mechanisms for continuous improvement and innovation throughout the engagement, ensuring the integration of global best practices and emerging technologies.

5 Mandatory Requirements and Proposal Submission

The purpose of this section is to outline the mandatory requirements that all proposers must meet to be considered responsive under this RFP. Compliance with the Mandatory Requirements will be evaluated on a Pass/Fail basis prior to the technical evaluation (work approach).

All supporting documents must be current, valid, and verifiable at the time of submission. Failure to submit any of the required documents will result in a non-compliant proposal.

5.1 Mandatory Requirements

All proposers must submit every document and certification listed in **Table 1** and **Table 2** as part of their proposal package. Each proposer must complete and sign attachments (**Annex A**) and the checklist must be included as the first page of the Mandatory Requirements section of the proposal package.

Table 1 – Organizational Documents

| Description / Documentation Needed | |
|--|---|
| RUP – Registro Único de Proponentes | Copy of valid registration issued by the Puerto Rico General Services Administration (ASG). |
| Certification of Legal Entity / Corporate Structure | Official certification identifying owners, officers, or members of the proposing entity. |
| Shareholder or Partner List | List of shareholders or partners and their ownership percentage within the proposing entity. |
| Employer Identification Number (EIN) | Copy of the Employer Identification Number (IRS Form SS-4 confirmation letter). |
| Good Standing Certificate | Issued by the Puerto Rico Department of State confirming the entity is active and in good standing. |

| | |
|--|---|
| Certificate of Existence or Authorization to Do Business in Puerto Rico | For non-local entities, provide certificate authorizing the entity to conduct business in Puerto Rico. |
| Merchant Registration Certificate | Issued by the Puerto Rico Department of Treasury (Hacienda). |
| Partnership Authorization Letter / Corporate Resolution | For partnerships: letter or resolution designating the authorized signatory. For corporations: certified Board of Directors resolution with corporate seal authorizing participation and contract execution. |
| Financial Statements | Year-end audited, reviewed, or compiled financial statements for the most recent two (2) years, issued by a Certified Public Accountant (CPA) in accordance with U.S. GAAP. Must include Balance Sheet, Statement of Operations, Statement of Cash Flows, and Notes. If the Proposer has not been in business within the year prior to the submission date, it must provide, for each Principal, Stockholder, Partner, or Member with 25% or more ownership (and those providing capital or guarantees): (1) audited, reviewed, or compiled financial statements for the last two years, prepared by a CPA under US GAAP. The financial statements must include Balance Sheet, Statement of Operations, Statement of Cash Flows, and notes to the financial statements; (2) a sworn statement dated within sixty (60) days before submission identifying all Principals, Stockholders, Partners, Members and their business participation; and (3) copies of income tax returns for the last two years. |

Table 2 – Certifications and Affidavits

| Requirement | Description / Documentation Needed |
|--|--|
| Sworn Statement of Compliance with Act No. 2-2018 | Use the standard format provided after Annex A in the RFP package; the document must be signed and notarized. |
| Conflict of Interest Certification | Statement declaring the absence of any actual or potential conflict of interest with PRDEDC or other Government of Puerto Rico agencies. Use the standard format provided after Annex A. |
| Criminal and Ethical Background Declaration | Sworn statement that neither the proposer nor its principals have any criminal record or pending ethical proceedings. |
| Sales and Use Tax (IVU) Debt Certification – Model SC-2927 | Issued by the Puerto Rico Department of Treasury. |
| Income Tax Filing Certification – Model SC-6088 | Issued by the Puerto Rico Department of Treasury. |
| Debt Certification – Model SC-6096 | Issued by the Puerto Rico Department of Treasury. |
| Sales and Use Tax Return Filing Certification – Model SC-2942 | Issued by the Puerto Rico Department of Treasury. |

| | |
|--|--|
| Employer Registration and Unemployment/Disability Insurance Certification | Issued by the Puerto Rico Department of Labor and Human Resources. |
| Chauffeurs' Social Security Fund Certification | Issued by the Puerto Rico Chauffeurs' Social Security Fund Administration. |
| State Insurance Fund Corporation (CFSE) Debt Certification – Form CFSE-3047 | Issued by the Puerto Rico State Insurance Fund Corporation. |
| ASUME Compliance Certification | Corporate or individual certification of compliance issued by the Puerto Rico Child Support Administration (ASUME). |
| Municipal Tax (CRIM) Certification | Certification of filing and debt status for both personal and real property taxes, issued by the Municipal Revenue Collection Center (CRIM). |
| General Debt Certification (All Concepts) | Comprehensive debt certification covering all tax obligations, issued by the corresponding Puerto Rico government agencies. |

6 Proposal Evaluation and Scoring Criteria

6.1 Evaluation Process Overview

Proposals will be evaluated through a structured, multi-stage process to ensure fairness, transparency, and alignment with the objectives of the PRDEDC. The evaluation process will consist of the following stages:

- **Stage 1 – Mandatory Requirements (Pass/Fail):** Verification of all documents and certifications required in Section 5. Only proposals that meet all mandatory requirements will advance to the next stage.
- **Stage 2 – Technical Evaluation:** Assesses the proposer's ability to deliver a secure, bilingual AI chatbot with native SBP integration, strong UX, governance, compliance, and a clear plan to meet PRDEDC KPIs.
- **Stage 3 – In-Person Presentation & Demo Session:** Proposers that pass the technical evaluation will be invited to present their solution to the Evaluation Committee. The session will include:
 - A **live demonstration** of the proposed chatbot and key functionalities.
 - Explanation of architecture, UX design, and compliance approach.
 - Q&A to clarify methodology, timeline, and risk mitigation strategies. (See Section 6.3 for details.)

- **Stage 4 – Cost Plan Evaluation:** Review of the proposed budget and pricing structure after completion of the technical and demo stages. Evaluation will consider cost-effectiveness, clarity, and alignment with the proposed scope of work.
- **Stage 5 – Final Composite Score and Recommendation for Award:** Compilation of results from all stages to determine final rankings and recommendations. The Evaluation Committee will prepare a report and submit its recommendation to the Secretary of PRDEDC for final adjudication.

6.2 Evaluation Criteria and Weighting

Each eligible proposal will be scored according to the criteria below. The total possible score is 100%.

Table 3 – Evaluation Criteria and Scoring Weights

| Evaluation Factor | Description | Score (%) |
|--|--|-------------|
| Technical Approach and Work Plan | Evaluates the clarity and feasibility of the proposed strategy for delivering a bilingual, AI-powered chatbot embedded in SBP and Incentives Platform. Includes conversational design, UX, integration, compliance, scalability, and measurable KPIs (NPS, CSAT, application growth). Proposals that demonstrate delivery in ≤6 months with quality and sustainability will be highly favorable. | 30% |
| Institutional Experience and Past Performance | Assesses the proposer's track record in chatbot or AI-driven public service projects, considering relevance, scale, client references, and documented success cases. | 15% |
| Proposed Team and Management Capacity | Evaluates qualifications of key roles (Project Manager, AI/ML Specialist, UX Designer, Compliance Officer) and ability to manage chatbot development, integration, and governance effectively. | 20% |
| Cost Plan | Reviews clarity and reasonableness of the financial proposal, including post-deployment support (runtime, maintenance, extended support). Emphasizes cost-effectiveness and sustainability. | 15% |
| Innovation and Added Value | Considers advanced features beyond baseline requirements, such as analytics dashboards, multilingual expansion, proactive guidance, and AI guardrails. | 5% |
| In-Person Strategic Presentation (Demo Session) | Demonstrates feasibility and creativity through a live chatbot demo , admin console, architecture overview, and effective Q&A responses. | 15% |
| Total | | 100% |

6.3 In-Person Strategic Presentation Session

Proposers will be invited to participate in an **in-person technical demonstration session** before the Evaluation Committee.

If a live demo is **not feasible**, proposers must present **documented success stories and case studies** that clearly demonstrate their ability to deliver similar solutions on a scale, including measurable outcomes and client references.

The session must provide a **clear, practical showcase of the proposed solution or proven capabilities**, including:

- **Live demonstration** of the bilingual chatbot answering permit and Act 60 incentive questions with accurate, source-backed responses and AI guardrails; **or**
- **Success stories** highlight comparable implementations, technical architecture, and performance metrics.
- **Admin console** for content updates, governance, and version control.
- **Architecture overview** (Azure), security and compliance posture, and operational dashboards.
- **Evidence of testing** (UAT scenarios or validation reports) demonstrating accuracy and containment.

Session Format:

- **15 minutes** for demo or presentation of success stories.
- **15 minutes** for Q&A focused on technical approach, integration, and governance.

Evaluation Criteria:

- **Strategic clarity and technical soundness:** How well the solution or success stories align with PRDEDC's objectives and demonstrate feasibility.
- **Creativity and innovation:** Integration of advanced technologies and added-value features beyond baseline requirements.
- **User experience and compliance:** Accessibility, bilingual support, and adherence to security standards.
- **Responsiveness and engagement:** Ability to address evaluator questions effectively during Q&A.

Scores assigned in this component will form part of the overall technical evaluation score, as defined in **Table 3**.

6.4 Cost Plan Evaluation

The Cost Plan will form an integral part of the overall proposal evaluation. PRDEDC will review the financial component in conjunction with the proposer's technical and strategic approach to ensure consistency, feasibility, and value. Evaluation of the Cost Plan will consider:

- Cost competitiveness relative to the proposed scope of work and prevailing market standards.

- Clarity and transparency in the pricing structure, including any assumptions or exclusions.
- Reasonableness and justification of costs, ensuring that proposed expenses are aligned with the scope, methodology, and anticipated deliverables.

PRDEDC may request clarifications or supporting documentation for any cost element during the evaluation process. For detailed instructions on how to prepare and structure the Cost Plan, refer to Section 7.3 of this RFP.

6.5 Final Selection and Award

The Evaluation Committee, appointed by the Secretary of the PRDEDC, will review and score all responsive proposals and make final recommendations to the Secretary. The Committee will conduct a comprehensive, fair, and impartial evaluation based on the criteria established in this RFP.

The Evaluation Committee may request clarifications from proposers to obtain a better understanding of specific sections of a submitted proposal. Responses to clarification requests must solely serve to explain or clarify information already included in the original submission and shall not introduce new material or modify the original proposal content.

Upon completion of the evaluation, the Committee will prepare a written report summarizing its findings and documenting the ranking of proposals based on the criteria stated in this section. This report, including the Committee's final recommendation, will be submitted to the Secretary of PRDEDC for adjudication and final determination.

Negotiations. Following the evaluation of proposals, PRDEDC may engage in negotiations with one or more qualified proposers. Negotiations are exchanges between the PRDEDC and proposers that are undertaken with the intent of allowing the proponents to revise their proposals. If the PRDEDC is not satisfied with the price offer of the proposer, they will recommend continuing further discussions/negotiations. The primary object of discussions is to maximize the PRDEDC ability to obtain the best value, based on the requirements and the evaluation factors outlined in the RFP. The PRDEDC Evaluation Committee may request and receive the best and final offers. The Evaluation Committee may request **Best and Final Offers (BAFOs)** as part of this process.

Selection and Award. The proponent to be selected for the award will be based on the evaluation rubric stated in this RFP and the negotiations section. PRDEDC, based on the overall proposals received and their evaluation results, shall determine the number of successful proposers that represent the best interest of the overall services implementation and the people of Puerto Rico.

The firm to be awarded the RFP shall be recommended by the Evaluation Committee. After the final recommendation from the Evaluation Committee, the Secretary of the PRDEDC will issue the Award Notice. Award will be made to the responsible and responsive proponent

whose Proposal represents the best value to the PRDEDC, taking all elements (including price and technical score) into consideration. Award will be made at fair and reasonable prices only. The DEDC reserves the right to select a proposal other than the lowest price from a proponent within the competitive range.

A proposal must conform to the material requirements of the RFP. If the proposal does not conform to the solicitation, it will be rejected because it is considered non-responsive. The Secretary of PRDEDC shall review the report of the Evaluation Committee and shall identify the proponent that should be selected to provide the services requested by this RFP. The determination of a proponent's selection will be based on the merits of the proposal presented, following the evaluation criteria. However, the Secretary of PRDEDC, taking into consideration the proponent's proposal and the Evaluation Committee recommendation, shall identify for selection the proponent as deemed most advantageous to the PRDEDC interests and objectives.

Award without Negotiation. If, after the initial evaluation of proposals, there is a clear winner and there is no need to negotiate or obtain further clarification or information from that proposer (e.g., the price is reasonable), the Secretary of PRDEDC may proceed directly to the award, provided that the RFP clearly stated that the award could be made without negotiations.

Notice of Selection. The PRDEDC will issue a written notice of selection to the successful proposer (the "Notice of Selection"). The Notice of Selection will establish the selected firm's obligation to submit any applicable post-award documentation.

PRDEDC reserves the right, without limitations, to: (i) grant more than one contract and/or select more than one qualified respondent; (ii) amend the Contract(s) of the Selected respondent (s) to, among others, extend its original duration, as further explained in this RFP, or to extend its scope to include additional work.

Insurance Requirement. Requirements for the selected bidder, to be able to sign the respective contract.

- Public Responsibility Policy / Professional Public Liability Policy for a minimum of \$1,000,000.
- Public Responsibility Policy endorsed to the Puerto Rico Department of Economic Development and Commerce. This must be identified with the description of the proposal.
- The tenderer is responsible for maintaining a Public Responsibility Policy endorsed in favor of the Puerto Rico Department of Economic Development and Commerce y for the entire term of the contract.
- The PRDEDC is not responsible for accidents or damages of any kind that the property and / or personnel of the tenderer could suffer. The bidder is responsible

for his assets and/ or, by means of insurance for this purpose, for any damage that will be caused to the property and / or to the staff of the PRDEDC.

Execution of Agreements. The PRDEDC will seek to execute a Service Agreement with the selected proposer. If an agreement cannot be reached, the PRDEDC may terminate negotiations with the chosen proponent and proceed to the next-highest rated proponent until an agreement determined to be fair and reasonable to both parties is obtained.

No proposal shall be binding upon the PRDEDC until an Agreement has been executed. The DEDC reserves the right to issue press releases or public statements regarding the services under the contract; and the right to cancel the award of an Agreement at any time before execution of the contract, without incurring in any liability.

Rejection of Proposals and Cancellation of RFP. Issuance of this RFP does not constitute a commitment by the Government of Puerto Rico and/or the PRDEDC to award a contract. The PRDEDC reserves the right, without limitations, to accept or reject, in whole or in part, and without further explanation, any or all proposals submitted; and/or to cancel this solicitation and reissue this RFP or another version of it, if it deems that doing so is in the best interest of the public interest, the Government of Puerto Rico, the PRDEDC or the impacted communities.

The PRDEDC reserves the right, without limitations, to disregard or waive any noncompliance, informalities and/or irregularities in the proposals received in response to this RFP, not otherwise identified as Mandatory Requirements and Qualifications in this RFP when, in its opinion, the public interest, the best interest of the Government of Puerto Rico, the PRDEDC or of the impacted communities will be served by such action.

7 Proposal Format and Submission Requirements

7.1 General Instructions

To ensure uniformity and facilitate prompt reference among all proposals, submissions must adhere to the following formatting and presentation requirements. Proposals will first be reviewed for completeness prior to detailed evaluation. Quality, substance, clarity, brevity, and responsiveness to PRDEDC's requirements are essential.

Formatting Requirements

- File format: PDF only.
- Font: Times New Roman, 12-point size.
- Line spacing: 1.15.
- Margins: 1 inch (2.54 cm) on all sides.
- Page size: 8.5" x 11" (Letter).

- Visual elements: All graphics, charts, and tables must be embedded within the document (external links are not permitted).
- Figures and tables: Must be numbered sequentially and referenced in the text by their corresponding number.

Signature Requirements

- All documents requiring a signature must be signed in blue ink.
 - Initials and signatures may be electronic (where applicable)

Language

- Proposals must be submitted in English.

The following subsection provides guidance on the expected structure and content of each proposal.

7.2 Proposal Organization and Structure

Each proposal shall follow the organizational structure described in this section to ensure clarity, consistency, and ease of evaluation. All content must be clearly labeled, and divided by section headers.

Cover Page:

Each proposal shall begin with a cover page clearly identifying the submission and the authorized point of contact. The cover page must include the RFP title and number, the legal name of the proposer, its mailing and email addresses, and the name, title, and telephone number of the authorized representative. The submission date must also appear on this page.

Immediately following the cover page, proposers shall include a **Table of Contents**, listing all major sections and subsections of the proposal. The Table of Contents shall follow the nomenclature outlined below and serve as both an index and a checklist confirming that all required components are present. It is the proposer's responsibility to ensure that all sections of the proposal are identified and easy to locate.

Part 1 – Mandatory Requirements

This section shall include all administrative, legal, and organizational documents required under Section 5, including the completed and signed **Annex A**. These materials will be reviewed on a pass/fail basis to determine eligibility prior to technical evaluation.

All documents must be current, valid, and organized in the same order as listed in the checklist to facilitate compliance verification.

Part 2 – Executive Summary

This section shall provide a concise overview of the proposal, highlighting the proposer's qualifications, experience, and overall understanding of PRDEDC's needs. It should serve as a clear and non-technical introduction to the firm's capabilities, focusing on alignment with PRDEDC's communications and economic development priorities.

The Executive Summary shall not exceed three (3) pages in length.

Part 3 – Company Information, Relevant Experience, and Past Performance

This section establishes the proposer's organizational profile and demonstrates its past performance in similar engagements. The proposer shall include basic identifying information such as legal name, registration number, address, contact details, and the name and signature of the authorized representative.

Proposers are expected to summarize their corporate background and describe prior experience in projects of comparable scope or complexity, highlighting specific outcomes that demonstrate success.

Additionally, proposers must indicate their type of organization (e.g., corporation, partnership, joint venture, or sole proprietorship) and disclose any potential conflicts of interest, including prior or current relationships with PRDEDC, other government entities, or affiliated agencies.

The proponent must disclose any prior contractual relationship between the legal entity, its partners, shareholders, officers, directors, or any other natural or legal person expected to participate in the execution of the contract, and the PRDEDC, its operational and affiliated entities, the Government of Puerto Rico, and/or any other federal or municipal government agency.

Part 4 – Approach to Scope of Services (Technical Proposal)

This section constitutes the core of the proposal and should articulate the proposer's comprehension of the assignment, proposed methodology, and rationale. The content should clearly address how the proposer intends to achieve the objectives described in **Section 3 - Scope of Work / Statement of Work**.

The Technical Proposal **shall not exceed 30 pages**. Any pages beyond this limit will not be reviewed or scored by PRDEDC.

Part 5 – Team Composition and Management Structure

This section shall describe the organizational structure and resources assigned to the project, including:

- Complete list of proposed team members, indicating names, roles, titles, years of experience, and areas of specialization.
- Resumes or professional summaries for each key staff member.
- Provide an organizational chart highlighting the key people who shall be assigned to accomplish the work required by this RFP, illustrating the lines of authority. Identification of any subcontractors, consultants, or strategic partners (if applicable), including their roles and specific functions.

Part 6 – References for Services Performed

The final section shall include **at least 3 professional references** from prior clients comparable in scope, scale, or complexity. Each reference must include the client's name, organization, project title, duration, and contact information (email and phone number).

These references will be used to validate the proposer's past performance, reliability, and capacity to meet contractual obligations.

7.3 Cost Plan – Budget breakdown and pricing structure

This section must present a clear and detailed breakdown of the proposed costs for the entire contract period. The information shall be organized in tables and supported by explanatory notes as necessary.

PRDEDC reserves the right to request clarification, justification, or adjustment of any cost item during the evaluation process to ensure accuracy and reasonableness. Any inconsistencies between the Technical Proposal and the Cost Plan may affect the final evaluation score. The required components are as follows:

1. **Summary of total proposed cost:** Provide the total proposed cost for all services under this RFP, expressed in both numeric and written form. This summary shall include the overall cost and the total cost per service area.
2. **Breakdown by service domain:** Each major service area described in Section 3 shall include the following:
 - Estimated hours or resource units.
 - Personnel or roles assigned.
 - Unit rates and total estimated cost per service area.
 - Identification of any subcontracted personnel or external specialists, if applicable.
3. **Personnel costs:** List all personnel expected to participate in the project, specifying:
 - Role or position title.
 - Hourly or daily rate.
 - Estimated total hours or days per resource.

Proposers may provide either hourly/daily rates or the total cost per deliverable; however, PRDEDC reserves the right to request clarification if needed.

4. **Explanatory narrative and pricing methodology** Include a concise narrative explaining the assumptions, pricing methodology, and basis of estimate used to determine costs. This narrative should describe how the pricing aligns with resource allocation, efficiency, and the scale of work required for each service area.
5. Proposers must include a detailed breakdown of **post-deployment costs** associated with operating and maintaining the solution after go-live. This includes, but is not limited to:
 - Runtime Costs: Estimated monthly or annual costs for infrastructure.
 - Hypercare Support: Post-launch stabilization period, including scope and duration of non-tariffed support.
 - Ongoing Maintenance: Monthly maintenance tiers with SLAs, QA, and monitoring. Proposers should specify pricing for different service levels.
 - Optional Extended Support: Any additional costs for extended production support if not included in the base contract.

These costs must be presented in a **separate table** within the Cost Plan and clearly labeled as “Post-Deployment Costs”

The **Cost Proposal** must be submitted as a **separate PDF file**, labeled: “Financial Proposal – DDEC RFP FY2026-003: *Proposer Name*”

Any discrepancies between the Technical Proposal and the Cost Plan may affect the final evaluation score.

7.4 Submission Method and Deadline

All proposals must be submitted by the deadline specified below. Proposals received after the stated date and time will not be accepted or evaluated.

Submission Deadline:

Date: Friday, February 13, 2026

Time: 11:59 PM AST

Any proposal received after this date and time shall be recorded as “late” and retained unopened in the official procurement file.

Email submission is the only accepted method for receipt of proposals in response to this RFP. All proposals must be submitted electronically in accordance with the following instructions:

- Proposals must be submitted as a PDF file, text-searchable (not scanned image-only), and not exceeding 25 megabytes (MB) in size.
- Proposals shall be submitted exclusively to **propuestas@ddec.pr.gov**. PRDEDC will not consider any proposals that are submitted to an email address different from the one specified in this section.
- The email subject line must include the RFP number and the company name, formatted as follows: “RFP DDEC-FY2026-003-*CompanyName*”
- File Naming Convention: The attached file must follow this format: *RFP-DDEC-FY2026-003_CompanyName.pdf*
- The Cost Plan must be submitted as a separate PDF file.

Proposers are responsible for ensuring that their submission is complete and that all files are accessible at the time of delivery.

The proposer is fully responsible for ensuring successful electronic transmission and delivery of its proposal. PRDEDC will not consider partial submissions received after the deadline, even if other parts were delivered timely.

- PRDEDC strongly recommends that proposers request a delivery receipt when sending their email submission.
- If an email transmission is rejected or an automatic acknowledgment is not received confirming successful delivery, the proposer must contact Yaneisha Perez Padilla at yaneisha.perez@ddec.pr.gov before the submission deadline.
- Any email containing viruses, malware, or corrupted attachments will be automatically rejected.
- PRDEDC staff will not open any email attachments prior to the closing of the submission period. PRDEDC does not assume any responsibility for delayed or rejected emails or for any files that cannot be opened.

7.5 Receipt of Proposals

All proposals must be received by the deadline specified in this RFP. Upon receipt, PRDEDC will date and time-stamp each submission as official evidence of timely delivery. Only proposals received on or before the submission deadline will be considered for evaluation. Submission of a proposal constitutes the proposer’s acknowledgment and acceptance of all terms, conditions, and disclaimers contained in this RFP, including PRDEDC’s reserved rights and options. Proposals shall remain valid for a minimum period of **one hundred and twenty (120) calendar days** from the submission deadline. During this period, proposers may not withdraw, modify, or cancel their submission, except as specifically requested in writing by PRDEDC or as otherwise required by applicable law or regulation.

7.6 Errors and Omissions in Proposals

PRDEDC reserves the right to reject any proposal that contains material errors, omissions, or inconsistencies that could affect its completeness or accuracy. However, PRDEDC may, at

its sole discretion and without obligation, request the proposer to correct minor clerical or administrative mistakes, or to provide clarifications or additional information necessary to facilitate evaluation.

It also reserves the right, without limitations, to request correction of any errors or omissions and/or to request any clarification or additional information from any proponent, without opening clarifications for all proponents.

7.7 Clarifications and Modifications

PRDEDC reserves the right to request written clarifications from proposers regarding their submissions. No material changes, price revisions, or additions to the original proposal will be permitted after the submission deadline, except at PRDEDC's written request. If proponent files more than one proposal before submission deadline, only the last version will be considered.

7.8 Confidentiality and Proprietary Information

All materials submitted in response to this RFP become the property of PRDEDC. Proposers must clearly identify and mark any portions of their submission that contain proprietary, trade secret, or confidential information. PRDEDC will handle such information with due care and in accordance with relevant statutes and regulations; however, the Department cannot guarantee the confidentiality of any material not properly labeled.

8 RFP Acquisition

8.1 RFP Documents Acquisition

All documents pertaining to the procurement process will be sent via e-mail upon request at propuestas@ddec.pr.gov. Requests for proposal guidelines will be answered during business hours, which are 8:00am to 4:30pm.

PRDEDC reserves the right to amend this RFP at any time. Any amendments to the RFP will be issued as a written addendum. Copies of each Addendum for all prospective proponents shall be sent by e-mail or can be retrieved at PRDEDC's website to all people and entities that requested the RFP instructions.

All documents pertaining to the procurement process, including addendum issued by PRDEDC, are and will be published at <http://www.desarrollo.pr.gov> under the section for RFPs. All prospective proponents must monitor the abovementioned website to retrieve addendum, if any, issued for the below-stated procurement process.

8.2 Allowed and Prohibited Communications

Communications by prospective proponents with officials and/or representatives of PRDEDC, and other government entities, or other relevant entities of the federal government, regarding any matter related to the contents of this RFP or the qualification and selection process, are prohibited during the submission and selection process. Failure to adhere to this requirement may result in the rejection of the submitted proposal. Verbal inquiries or e-mails sent to addresses not specified in this RFP will not be addressed by PRDEDC.

9 Contact & Schedule

9.1 Official Contact

All communications, inquiries, and submissions related to this RFP must be directed exclusively to the following official contact:

Name: Yaneisha Pérez Padilla

Email: yaneisha.perez@ddec.pr.gov

9.2 RFP Schedule and Key Dates

The following table summarizes the anticipated schedule for this procurement process. PRDEDC reserves the right to modify these dates through a written Addendum.

Table 4 – Key Dates

| Milestone | Description | Date |
|---------------------------------------|--|----------------------------------|
| RFP Issuance Date | Official release of the Request for Proposals. | <i>January 20, 2026</i> |
| Proposal Submission Deadline | Proposals are due electronically by 11:59 PM AST. | <i>February 13, 2026</i> |
| In-Person Presentation Session | Live demo + Q&A with Selection Committee. | <i>February 23–27, 2026</i> |
| Evaluation Period | Administrative, technical, presentation, and financial review. | <i>February 26–March 6, 2026</i> |
| Notice of Award | Notification of selected proposer. | <i>March 13, 2026</i> |

PRDEDC reserves the right to adjust this schedule as needed.

10 Annex A

Mandatory Requirements Checklist **Request for Proposals - RFP-DDEC-FY2026-003** **Puerto Rico Department of Economic** **Development and Commerce**

Submitted proposals must include the following documents in the order listed below. All forms provided as part of this RFP must be duly completed and incorporated within the proposal package. The Department of Economic Development and Commerce reserves the right to reject any proposal that fails to meet these mandatory requirements in full.

| Initials | Required Document |
|-----------------|--|
| | RUP – Registro Único de Proponentes |
| | Certification of Legal Entity / Corporate Structure |
| | Shareholder or Partner List |
| | Employer Identification Number (EIN) – (IRS Form SS-4 confirmation letter). |
| | Good Standing Certificate |
| | Certificate of Existence or Authorization to Do Business in Puerto Rico |
| | Merchant Registration Certificate |
| | Partnership Authorization Letter / Corporate Resolution |
| | Financial Statements |
| | Sworn Statement of Compliance with Act No. 2-2018 (Anticorruption Code) |
| | Conflict of Interest Certification |
| | Criminal and Ethical Background Declaration |
| | Sales and Use Tax (IVU) Debt Certification – Model SC-2927 |
| | Income Tax Filing Certification – Model SC-6088 |
| | Debt Certification – Model SC-6096 |
| | Sales and Use Tax Return Filing Certification – Model SC-2942 |
| | Employer Registration and Unemployment/Disability Insurance Certification |
| | Chauffeurs' Certification |

| Initials | Required Document |
|----------|--|
| | State Insurance Fund Corporation (CFSE) Debt Certification – Form CFSE-3047 |
| | ASUME Compliance Certification |
| | Municipal Tax (CRIM) Certification |
| | General Debt Certification (All Concepts) |

| | |
|----------------------|------|
| Proposer's Signature | Date |
|----------------------|------|

| |
|-------------------------|
| Proposer's Printed Name |
|-------------------------|

DECLARACIÓN JURADA

Ley 2-2018, Código Anti-Corrupción para el Nuevo Puerto Rico¹

[SWORN STATEMENT]

[Act 2-2018, Anti-Corruption Code for a New Puerto Rico]²

Yo, _____, en mi carácter personal y en representación de _____ (“Proponente” o “Licitador”), con número de seguro social patronal _____, mayor de edad, de profesión: _____, con estado civil: _____ y vecino de _____ el más solemne juramento declaro como sigue:

[I, _____, in my personal capacity and in representation of _____ (“Respondent” or “Bidder”), Tax I.D. Number _____, of legal age, with profession: _____, marital status: _____ and resident of _____, do hereby solemnly swear as follows:]

1. Mi nombre y demás circunstancias personales son las anteriormente expresadas.
[My name and personal circumstances are as stated above.]
2. A la fecha en que suscribo esta declaración jurada, el suscribiente, el Proponente o Licitador, su presidente, vicepresidente, director, director ejecutivo, miembro junta de oficiales o directores y personas que desempeñen funciones equivalentes para el Proponente o Licitador **no ha sido convicto ni se ha declarado culpable en el foro estatal o federal**, o en cualquier otra jurisdicción de los Estados Unidos, por cualquiera de los siguientes delitos: (a) apropiación ilegal agravada; (b) extorsión; (c) sabotaje de servicios públicos esenciales; (d) falsificación de documentos; (e) fraude; (f) fraude por medio informático; (g) fraude en las construcciones; (h) uso, posesión o traspaso fraudulento de tarjetas con bandas electrónicas; (i) enriquecimiento ilícito; (j) enriquecimiento ilícito de funcionario público; (k) enriquecimiento injustificado; (l) aprovechamiento ilícito de trabajos o servicios públicos; (m) intervención indebida en las operaciones gubernamentales; (n) negociación incompatible con el ejercicio del cargo público; (o) alteración o mutilación de propiedad; (p)

¹ Como requisito para la participación en esta Solicitud de Propuestas, el Proponente deberá suscribir esta declaración tal como está redactada, sin alteración, reserva o modificación de índole alguna. Si el suscribiente, Licitador o Proponente no puede suscribir esta declaración según redactada, deberá someter una certificación bajo juramento aclarando todas las excepciones y/o aclaraciones aplicables. Someter información falsa, incompleta o incorrecta podría conllevar la imposición de sanciones civiles y criminales en contra del suscribiente, el Proponente.

² [As a requirement to participate in this RFP, the Proposer must file this sworn statement in the exact form and content as set forth herein, without alteration, exception or modification of any kind. If the Proposer is unable to execute this statement in the exact form provided herein, the Bidder or Respondent shall submit a separate sworn certification stating all exceptions, clarifications or modifications to this form of sworn statement. The submission of false, incomplete or incorrect information could lead to the imposition of civil and/or criminal penalties against the Proposer.]

certificaciones falsas; (q) soborno, en todas sus modalidades; (r) influencia indebida; (s) malversación de fondos públicos; o (t) lavado de dinero.

2. *[As of the date of execution of this sworn statement, neither the undersigned nor the Respondent or Bidder, or its president, vice president, director, executive director, member of Board of officers or directors, or any persons performing equivalent functions on Respondent's or Bidder's behalf, has been convicted or has pleaded guilty in state or federal court, or in any other jurisdiction of the United States, for any of the following crimes: (a) aggravated misappropriation; (b) extortion; (c) sabotage of essential public services; (d) forgery of documents; (e) fraud; (f) electronic fraud; (g) construction fraud; (h) fraudulent use, possession or transfer of cards with electronic bands; (i) illicit enrichment; (j) illicit enrichment by public official; (k) unjustified enrichment; (l) illicit enrichment of public work or services; (m) improper intervention in government operations; (n) negotiation incompatible with the exercise of public office; (p) false certifications; (q) bribery, in all its modalities; (r) undue influence; (s) embezzlement of public funds; or (t) money laundering.]*
3. A la fecha en que suscribo esta declaración jurada y **por los pasados veinte (20) años**, ni el suscribiente, ni el Proponente o Licitador, ni cualquiera de sus siguientes oficiales: presidente, vicepresidente, director, director ejecutivo o miembro junta de oficiales o directores o personas que desempeñen funciones equivalentes para el Proponente o Licitador, ha sido convicto o se ha declarado culpable en el foro estatal o federal, o en cualquier otra jurisdicción de los Estados Unidos, por cualquiera de los siguientes delitos: (a) daño agravado; (b) retención de propiedad; (c) alteración o mutilación de propiedad; (d) archivo de documentos o datos falsos; (e) posesión y uso ilegal de información, recibos y comprobantes de pago de contribuciones; (f) compra y venta ilegal de bienes en pago de contribuciones; (g) presentación de escritos falsos; (h) posesión ilegal de recibos de contribuciones; (i) falsificación de asientos en registros; (j) falsificación de sellos; (k) falsedad ideológica; (l) falsificación de licencia, certificado y otra documentación; (m) falsificación en el ejercicio de profesiones u ocupaciones; (n) posesión y traspaso de documentos falsificados; (o) posesión de instrumentos para falsificación; (p) preparación de escritos falsos.
3. *[As of the date of execution of this sworn statement and **for the twenty (20) years** prior, neither the undersigned nor the Respondent or Bidder, or any of its officers, including its president, vice president, director, executive director, member of board of officers or directors, or any person performing equivalent functions on Respondent's or Bidder's behalf, has been convicted or has pleaded guilty in the state or federal forum, or in any other jurisdiction of the United States, for any of the following crimes: (a) aggravated damage; (b) property retention; (c) alteration or mutilation of property; (d) filing of false documents or data; (e) illegal possession and use of tax information, receipts and payment vouchers; (f) illegal purchase and sale of goods for the payment of taxes; (g) filing false writings; (h) illegal possession of tax receipts; (i) falsification of entries in registers; (j) forgery of stamps; (k) ideological falsehood; (l) forgery of license, certificates and other documents; (m) forgery in the exercise of professions or occupations; (n) possession and transfer of forged documents; (o) possession of counterfeit instruments; (p) preparation of false writings.]*

4. A la fecha en que suscribo esta declaración jurada y **por los pasados ocho (8) años**, ni el suscribiente, ni el Proponente o Licitador, ni cualquiera de sus siguientes oficiales: presidente, vicepresidente, director, director ejecutivo o miembro junta de oficiales o directores o personas que desempeñen funciones equivalentes para el Proponente o Licitador, ha sido convicto o se ha declarado culpable en el foro estatal o federal, o en cualquier otra jurisdicción de los Estados Unidos, por cualquiera de los siguientes delitos: (a) omisión en el cumplimiento del deber; (b) venta ilegal de bienes; (c) incumplimiento del deber; (d) negligencia en el cumplimiento del deber; (e) usurpación de cargo público; o (f) impedir la inspección de libros y documentos.
4. *[As of the date of execution of this sworn statement and **for the eight (8) years** prior, neither the undersigned nor the Respondent or Bidder, or any of its officers, including its president, vice president, director, executive director, member of board officers or directors, or any person performing equivalent functions on Respondent's or Bidder's behalf, has been convicted or has pleaded guilty in the state or federal forum, or in any other jurisdiction of the United States, for any of the following crimes: (a) omission in the fulfillment of duty; (b) illegal sale of goods; (c) breach of duty; (d) negligence in the fulfillment of duty; (e) usurpation of public office; or (f) preventing the inspection of records and documents.*
5. A la fecha en que suscribo esta declaración jurada y **por los pasados diez (10) años**, ni el suscribiente, ni el Proponente o Licitador, ni cualquiera de sus siguientes oficiales: presidente, vicepresidente, director, director ejecutivo o miembro junta de oficiales o directores o personas que desempeñen funciones equivalentes para el Proponente o Licitador, ha sido convicto o se ha declarado culpable en el foro estatal o federal, o en cualquier otra jurisdicción de los Estados Unidos, por delitos graves contra el ejercicio del cargo público o contra fondos públicos codificados en el Código Penal de Puerto Rico; la Ley Núm. 1-2012, según enmendada, la "Ley Orgánica de la Oficina de Ética Gubernamental"; o cualquier otro según dispuesto en la Ley 2-2018.
5. *[As of the date of execution of this sworn statement and **for the ten (10) years** prior, neither the undersigned nor the Respondent or Bidder, or any of its officers, including its president, vice president, director, executive director, member of board officers or directors, or any person performing equivalent functions on Respondent's or Bidder's behalf, has been convicted or has pleaded guilty in the state or federal forum, or in any other jurisdiction of the United States, for crimes against the exercise of public office or public funds as defined in the Puerto Rico Penal Code, ; Law No. 1-2012, as amended, the Government Ethics Office Enabling Act; or any other crime defined in Law 2-2018.]*
6. Entiendo y acepto el deber de informar cualquier cambio al contenido de esta declaración durante el proceso de contratación o la vigencia del contrato, ya sea por alegación de culpabilidad o convicción por cualquiera de los delitos antes mencionados, o cualquier otra conducta proscrita en el "Código de Ética para Contratistas, Suplidores y Solicitantes de Incentivos Económicos de las Agencias Ejecutivas del Gobierno de Puerto Rico", Código Anticorrupción para el Nuevo Puerto Rico, Título III, Ley 2-2018.

6. *[I accept and acknowledge my obligation to inform of any change or modification to this statement during the contracting process or the term of the contract, as the result of a guilty plea or conviction for any of the above-mentioned crimes or any other conduct prohibited by the "Code of Ethics for Contractors, Suppliers of Goods and Services and Applicants for Economics Incentives of the Executive Agencies of the Government of Puerto Rico", Title III, Law 2-2018.]*
7. Entiendo y acepto que la convicción posterior a esta declaración por cualquiera de los delitos enumerados en cualquiera de los incisos anteriores conllevará, además de cualquiera otra penalidad, la rescisión automática de cualquier contrato entre el suscriptor, el Proponente o el Licitador, y el Departamento de Desarrollo Económico y Comercio de Puerto Rico.
7. *[I accept and acknowledge that a conviction for any of the crimes specified in the above paragraphs will result, in addition to any other penalties, in the immediate termination of any contract in force at the time of conviction, between the undersigned, the Bidder or Respondent, and the Puerto Rico Department of Economic Development and Commerce, at the date of conviction or guilty plea.]*
8. El suscriptor, el Proponente o el Licitador, según sea el caso, se compromete a cumplir con lo dispuesto en el Código de Ética para Contratistas, Suplidores y Solicitantes de Incentivos Económicos de las Agencias Ejecutivas del Gobierno de Puerto Rico", Código Anticorrupción para el Nuevo Puerto Rico, Título III, Ley 2-2018.
8. *[The undersigned and/or the Bidder or Respondent, as the case may be, commits to complying with the "Code of Ethics for Contractors, Suppliers of Goods and Services and Applicants for Economics Incentives of the Executive Agencies of the Government of Puerto Rico", Title III, Law 2-2018.]*
9. Suscribo esta declaración jurada de conformidad con las disposiciones de la Ley 2-2018, y los requisitos de esta Solicitud de Propuestas.
9. *[I execute this sworn statement pursuant to Law 2-2018, and the terms and provisions of this RFP.]*
10. Hago la presente declaración jurada para que el Departamento de Desarrollo Económico y Comercio de Puerto Rico tenga conocimiento de lo aquí declarado para cualquier propósito administrativo y/o legal.
10. *[I execute this sworn statement so that the Puerto Rico Department of Economic Development and Commerce has knowledge of what is herewith declared and for any administrative and/or legal purpose in relation thereto.]*

[FIRMAS EN LA PRÓXIMA PÁGINA/ SIGNATURES ON THE NEXT PAGE]

Y PARA QUE ASÍ CONSTE, juro y suscribo la presente Declaración Jurada en _____,
_____ hoy ____ de _____ de 20 ____.

[NOW THEREFORE, I hereby swear and sign this Sworn Statement in _____,
_____ this ____ of _____, 20 ____.]

Declarante [Affiant]

Affidavit No: _____

*Jurado y suscrito ante mí en la ciudad de _____, _____, hoy ____ de
_____ de 20____, por _____, mayor de edad,
_____ (estado civil), _____ (ocupación) y residente de
_____, _____, en su capacidad de _____ del Proponente.*

A quien conozco personalmente o he identificado mediante _____.

*[Subscribed and sworn to before me in the city of _____, this ____ day
of _____, 20____, by _____ of legal age, _____ (civil
status), _____ (occupation) and resident of _____, _____, in
his/her capacity as _____ of Bidder. Who I personally know or have identified by
his/her _____.]*

Notario Público [Public Notary]

NON-CONFLICT OF INTEREST CERTIFICATION
CERTIFICACIÓN DE NO CONFLICTO DE INTERÉS

CERTIFICACIÓN DE AUSENCIA DE CONFLICTO DE INTERÉS

Request for Proposals – [Insert RFP Title]

Solicitud de Propuestas – [Título de RFP]

RFP No.: [XXX] / Núm. de RFP: [XXX]

I, _____, of legal age, _____ [marital status],
and resident of _____, hereby certify, as the duly authorized
representative of _____ (“the Proposer”), that:

Yo, _____, mayor de edad, _____ [estado civil], y
residente en _____, por la presente certifico, como representante
autorizado(a) de _____ (“el Proponente”), que:

1. The Proposer, its officers, directors, employees, agents, or affiliates have no financial, contractual, or personal interests, whether direct, indirect, actual, apparent, or potential, that would conflict in any manner or degree with the impartial performance of obligations under this procurement or any resulting contract.

[El Proponente, sus oficiales, directores, empleados, agentes o afiliados no tienen intereses financieros, contractuales o personales, ya sean directos, indirectos, reales, aparentes o potenciales, que puedan entrar en conflicto en cualquier forma o grado con el desempeño imparcial de las obligaciones relacionadas con esta adquisición o con cualquier contrato resultante.]

2. No public official or employee of the PRDEDC or the Government of Puerto Rico has requested, received, or been offered any payment, gratuity, gift, favor, service, or thing of value from the Proposer, its affiliates, or representatives in connection with this RFP.

[Ningún funcionario o empleado del DDEC o del Gobierno de Puerto Rico ha solicitado, recibido o se le ha ofrecido pago, gratificación, regalo, favor, servicio o cosa de valor por parte del Proponente, sus afiliados o representantes, en relación con esta Solicitud de Propuestas.]

3. The Proposer and its personnel have not participated in the preparation of this RFP, nor hold any position that may compromise their independence or create the appearance of preferential access or privilege information.

[El Proponente y su personal no han participado en la preparación de esta Solicitud de Propuestas, ni ocupan posición alguna que pueda comprometer su independencia o crear la apariencia de acceso preferencial o información privilegiada.]

4. The Proposer certifies that it does not have any relationship within the fourth (4th) degree of consanguinity or the second (2nd) degree of affinity with any official or employee of PRDEDC who may influence or participate in the procurement or decision-making process.

[El Proponente certifica que no mantiene relación alguna dentro del cuarto (4to) grado de consanguinidad ni del segundo (2do) grado de afinidad con ningún funcionario o empleado del DDEC que pueda influir o participar en el proceso de adquisición o en la toma de decisiones relacionadas.]

5. The Proposer acknowledges and agrees to comply with the applicable provisions of Act No. 2-2018, known as the Anti-Corruption Code for the New Puerto Rico, including Title III – Code of Ethics for Contractors, Suppliers, and Applicants for Economic Incentives of the Government of Puerto Rico, as amended.

[El Proponente reconoce y acepta cumplir con las disposiciones aplicables de la Ley Núm. 2-2018, conocida como el Código Anticorrupción para el Nuevo Puerto Rico, incluyendo el Título III – Código de Ética para Contratistas, Suplidores y Solicitantes de Incentivos Económicos del Gobierno de Puerto Rico, según enmendada.]

6. The Proposer further agrees to promptly disclose in writing to PRDEDC any situation or relationship that may develop during the procurement process or the term of any resulting agreement that could reasonably be perceived as a conflict of interest.

[El Proponente además se compromete a divulgar por escrito, de manera inmediata al DDEC, cualquier situación o relación que pueda surgir durante el proceso de adquisición o durante la vigencia de cualquier acuerdo resultante que razonablemente pueda percibirse como un conflicto de interés.]

Proposer's Initials: _____

In light of the above, I declare under penalty of perjury that the foregoing is true, correct, and made in good faith.

[Declaro bajo pena de perjurio que lo anterior es cierto, correcto y hecho de buena fe.]

Signature Authorized Representative
[Firma del/la Representante Autorizado(a)]

Date
[Fecha]

Printed Name of Authorized Representative
[Nombre en Letra de Molde del/la Representante Autorizado(a)]

Title
[Puesto]