



# **REQUEST FOR PROPOSALS**

## **Instructions to Bidders**

**Seeking Proposals for  
BESS Equipment and Integration**

[Barceloneta Solar + Storage \(MTR\)](#)

[Barceloneta Storage](#)

[Santa Isabel Storage 1](#)

[Santa Isabel Storage 2](#)

Release Date: September 5, 2024  
Proposals Due: September 26, 2024

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## 1.0 Introduction

### 1.1 Company Introduction

Pattern Energy is a leading developer, operator and owner of renewable energy infrastructure projects and facilities across North America. Their mission is to transition the world to renewable energy through the sustainable development and responsible operation of facilities with respect for the environment, communities, and cultures where we have a presence. Headquartered in San Francisco, Pattern has a portfolio of power facilities and transmission assets producing and transporting nearly 6,000 MW of power across North America, serving various customers that provide low-cost clean energy to millions of consumers.

### 1.2 Invitation and Overview

Pattern Puerto Rico Renewables Development LLC, (the “Buyer”) will be soliciting proposals from experienced turnkey BESS Equipment Suppliers providers (“Bidders” or “Contractors”) capable of providing BESS Equipment, Energy Management System / SCADA / Power Plant Controller (PPC)<sup>1</sup>, Integration and Commissioning for the following battery storage projects in Puerto Rico (collectively, the “Projects”):

Project Name	Configuration	Power / Energy	COD
Barceloneta Solar + Storage (MTR)	AC Coupled BESS	31.5 MW / 10.5 MWh	12/15/2026
Barceloneta Storage	Standalone BESS	50 MW / 200 MWh	12/15/2026
Santa Isabel Storage 1	Standalone BESS	50 MW / 200 MWh	2/15/2027
Santa Isabel Storage 2	Standalone BESS	80 MW / 320 MWh	2/15/2027

The Projects have a secured off-taker. The desired outcome of this RFP is the successful negotiation and execution of individual Supply Agreements aligned to the Form of Supply Agreement provided in the RFP package. Any person or entity responding to this RFP is referred to herein individually as a “Bidder” and collectively as “Bidders.” A Bidder may consist of one or more “Contractor.”

### Bidder Scope of Work

The Bidder shall provide BESS equipment, integration and commissioning of the BESS Facility up to and including the MVT to include:<sup>2</sup>

- A. Battery System
- B. BESS Facility EMS
- C. Supervisory Control and Data Acquisition (SCADA)
- D. Project PPC
- E. Power Conversion System (PCS)

<sup>1</sup> PPC only for Barceloneta Solar + Storage (MTR) Project

<sup>2</sup> Bidder to review Exhibit A-1 Scope of Work BESS, Exhibit A-2 Scope of Work EMS/PPC and Exhibit A-3 Division of Responsibilities. Pricing to be submitted DDP using Appendix B Schedule of Values. Pricing must be inclusive of Commercial Terms found in Form of Supply Agreement.

- F. Reactive Power Loading Requirements at PCS
- G. Medium Voltage Transformer (MVT)
- H. Device Integration
- I. Warranty
- J. Performance and Delay Guarantees
- K. Equipment Cold and Hot Commissioning
- L. Commissioning and Substantial Completion Testing for the BESS Facility (all Projects)
- M. Commissioning and Substantial Completion Testing for the PPC and Project
- N. Service Level Agreement (if Applicable and Required for Warranty and Performance Guarantees)<sup>3</sup>
- O. Delivery to site (DDP)

### **Owner Scope of Supply/Work**

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The Buyer's Scope of Supply/Work includes:

1. 115kV Generator Step-Up (GSU) Transformer and Breaker
2. MV Switchgear
3. Balance of System Minor Equipment
4. Solar PV Equipment (modules, racking, trackers, controller)
5. Solar PV and BESS MV and HV Engineering, Procurement and Construction (EPC)

### **Technical Specifications**

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Technical Specifications for each Project are provided in Exhibit A-1 Scope of Work BESS Section 2.0.

### **1.3 RFP Communications**

Fractal Energy Storage Consultants is serving as Owner's Engineer and will manage the RFP process on behalf of the Buyer. The Buyer will be copied on all correspondence. All submittals, inquiries, and communications relating in any manner to this RFP should be directed to the following points of contact. Correspondence / bid submission must have the following in the subject line:

E-mail to: Scott Huennekens, Fractal Energy Storage Consultants  
[scott@fractalba.com](mailto:scott@fractalba.com)  
cc: Pattern Puerto Rico Renewables Development LLC  
Andrew Wicks, [Andrew.Wicks@patternenergy.com](mailto:Andrew.Wicks@patternenergy.com)  
Joel Kasper, [joel.kasper@patternenergy.com](mailto:joel.kasper@patternenergy.com)  
Steve Malinoski, [Steve.Malinoski@patternenergy.com](mailto:Steve.Malinoski@patternenergy.com)  
Vinay Tanted, [vinay.tanted@patternenergy.com](mailto:vinay.tanted@patternenergy.com)  
Subject: Pattern Puerto Rico Turnkey BESS RFP - QA

During the RFP process, please submit questions using Appendix A - Bidder QA Template to [scott@fractalba.com](mailto:scott@fractalba.com). Please note that consistent with policy, any questions submitted after the

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<sup>3</sup> SLA must be with same business entity, subsidiaries not accepted.

question deadline may not be reviewed or answered. Written responses to questions will be distributed to all intended Bidders unless the questions is noted as confidential.

## 1.4 Schedule

Table 1 shows the RFP schedule of events. Additional events may be scheduled after the RFP is distributed. Should the schedule of events change, the Buyer will notify the Bidders, however it is the Bidder's sole responsibility to keep informed of the schedule.

*Table 1 – Estimated RFP Schedule*

<b>Milestone</b>	<b>Date</b>
RFP Release Date	September 05, 2024
Deadline for Bidder's Questions	September 20, 2024
Final Responses to Questions	September 24, 2024
<b>Bidder Proposals Due</b>	<b>By 5:00 p.m. PT, September 26, 2024</b>
Target date for Shortlist Selection	September 27, 2024
Finalist Notification	September 30, 2024
Finalist Contract Negotiations	September 30, 2024
Fully Executed Agreement(s)	October 31, 2024

## 1.5 Eligibility Requirements

This section describes the minimum requirements that all Proposals shall satisfy to be eligible for consideration. Unless the Buyer in its sole discretion elects otherwise, Proposals that do not comply with these requirements will be deemed ineligible and will no longer be considered.

The Buyer, at its sole discretion, may change the terms, requirements and schedule of this solicitation. Bidders should monitor announcements regarding any updates or changes including circulated questions and answers.

### Technology Eligibility

BESS technology must have a minimum of twelve (12) months of successful operating history with at least 5 MW or larger deployed at a single site with a successful operational history of at least 1 year. Technology must comply with current codes and standards in Exhibit A-1 Scope of Work BESS.

### Bidder Eligibility

The Bidder's project development team must demonstrate experience and performance records of similar work. Experience on island BESS projects is preferred. Please include a reference(s).

### Safety Eligibility

The Buyer has requested safety history from Bidders to help our company objectively manage contractor safety prequalification requirements (see Section 2.2 – Proposal Requirements).

## 2.0 Submittal Requirements

### 2.1 Submission Instructions

E-mail to: Scott Huennekens, Fractal Energy Storage Consultants  
[scott@fractalba.com](mailto:scott@fractalba.com)  
**cc:** Pattern Puerto Rico Renewables Development LLC  
 Andrew Wicks, [Andrew.Wicks@patternenergy.com](mailto:Andrew.Wicks@patternenergy.com)  
 Joel Kasper, [joel.kasper@patternenergy.com](mailto:joel.kasper@patternenergy.com)  
 Steve Malinoski, [Steve.Malinoski@patternenergy.com](mailto:Steve.Malinoski@patternenergy.com)  
 Vinay Tanted, [vinay.tanted@patternenergy.com](mailto:vinay.tanted@patternenergy.com)

Subject: Pattern Puerto Rico Turnkey BESS RFP – [Company Name]

### 2.2 Proposal Requirements

Bidders must prepare and submit a formal proposal. The following guidelines are provided for standardizing the preparation and submission of the Proposals. The intent is to assist Bidders in the preparation of their submissions and to assist the Buyer in simplifying the review process.

- Proposals should be less than 30 pages long (excluding appendices or exhibits).
- Email attachments must be less than 25 MB.
- Box, Dropbox, Sharepoint (or similar) may be used to submit proposals.
- It is the Bidder's responsibility to confirm receipt of proposals by the Owner.

#### *Bidder Proposal Requirements*

<b>1.</b>	<b>Cover Letter (max 1 page)</b>
	<p>Bidders must include a cover letter that:</p> <ul style="list-style-type: none"> <li>• Clearly indicates the Bidder has carefully read all the provisions of the RFP</li> <li>• Includes a commitment by the Bidder, if selected, to enter good faith negotiations with the Buyer</li> <li>• Names the person(s) authorized to represent the Bidder (including for each person their title, address, e-mail address and telephone numbers)</li> <li>• Specifies the term of the pricing</li> </ul>
<b>2.</b>	<b>Table of Contents</b>
	<p>Bidder must include a navigable table of contents in the Proposal, itemizing the sections and subsections of the Proposal.</p>
<b>3.</b>	<b>Project Team and Qualifications</b>
	<p>The Bidder must:</p> <ul style="list-style-type: none"> <li>• Overview of the company (or teaming arrangement of major contractors) proposing the resource</li> <li>• Legal entity name and address of the contracting party</li> <li>• Parent company name (agreements will require parent company guarantee)</li> <li>• Identify the overall team leader and his/her full contact information</li> <li>• Provide roles and bios of personnel to be directly involved with the project</li> </ul>

<b>4.</b>	<b>Experience</b>
	<p>The Bidder must have experience completing similar projects. The Bidder must provide the following information regarding the Bidder's qualifications and experience, particularly as it relates to completed projects of a similar scope and scale:</p> <ul style="list-style-type: none"> <li>Recent Projects - provide a table of recent and similar projects <u>to include</u>: <ul style="list-style-type: none"> <li>Project Name, Location, Off-Taker and COD</li> <li>Project Size (Power / Energy) and Applications Performed</li> <li>Project Manager</li> <li>Equipment Provided</li> <li>Information on any projects not completed, subject of a lawsuit or arbitration demand</li> </ul> </li> <li>Aggregate BESS capacity installed by Bidder over time (MW and MWh)</li> <li>Biggest BESS project</li> <li>Any previous PREPA or Island experience, if yes, detail subcontractors and equipment utilized and references</li> <li>References for recent BESS projects</li> </ul>
<b>5.</b>	<b>Technology Summary</b>
	<ul style="list-style-type: none"> <li>The Bidder must list all major components (battery modules, battery management system, BESS enclosure, thermal management, fire protection system, PCS, MVT, EMS and provide a summary of services.</li> </ul>
<b>6.</b>	<b>Warranty</b>
	<p>The Bidder must include a summary table of Warranty options and pricing for all major equipment provided:</p> <ul style="list-style-type: none"> <li>Base Lump Sum Warranty Years 1-5</li> <li>Extended Lump Sum Warranty Years 6-10</li> <li>Extended Lump Sum Warranty Years 10-15</li> <li>Extended Lump Sum Warranty Years 15-20</li> </ul>
<b>7.</b>	<b>Performance Guarantees</b>
	<p>The Bidder must review the performance guarantees (Exhibit J-1 – Performance Guarantees and Liquidated Damages) to include:</p> <ul style="list-style-type: none"> <li>Guaranteed Availability</li> <li>Guaranteed Power</li> <li>Guaranteed Energy</li> <li>Guaranteed RTE</li> <li>Guaranteed Substantial Completion Date</li> </ul>
<b>8.</b>	<b>Project Design Package</b>
	<p>The Bidder must submit:</p> <ul style="list-style-type: none"> <li>Specification and data sheets from manufacturers of all major components (may submit in appendices)</li> <li>Station power sizing and design requirements for equipment provided assuming one cycle per day.</li> </ul>

<b>9.</b>	<b>Testing</b>
	<p>The Bidder must submit a description of the following test plans for all major equipment provided:</p> <ul style="list-style-type: none"> <li>• Factory Acceptance Testing (FAT) Plan</li> <li>• Cold Commissioning Plan</li> <li>• Hot Commissioning Plan</li> <li>• BESS Unit Level Commissioning</li> </ul>
<b>10.</b>	<b>Maintenance, Monitoring and Spare Parts</b>
	<p>The Bidder must also provide a detailed list of all services that can be included in a maintenance and monitoring contract. Contract performance must be evaluated annually, within 60 days of COD anniversary. The Bidder must provide the following information:</p> <ul style="list-style-type: none"> <li>• Provide a description of all required maintenance activities during the Warranty Period, <u>including</u> estimated man-hours, frequency and annual cost</li> <li>• Provide projected system downtime for each maintenance activity <u>including</u> the percentage of system offline and duration of downtime</li> <li>• During the warranty period, can the maintenance be performed by a third-party? Would the third-party require specific OEM certifications?</li> <li>• Provide a sample annual maintenance schedule</li> <li>• Provide details of experience performing maintenance and monitoring and include a description of the 24/7 monitoring center</li> <li>• Provide a description of all activities included with monitoring services during the Warranty Period and any additional options or costs</li> <li>• Provide list of recommended spare parts, part numbers and pricing</li> </ul>
<b>11.</b>	<b>Training Plan</b>
	<p>The Bidder must provide a detailed description of a training plan for the Buyer's personnel and first responders including:</p> <ul style="list-style-type: none"> <li>• Sample schedule</li> <li>• Topics</li> <li>• Course Materials</li> </ul>
<b>12.</b>	<b>Financial Capability</b>
	<p>The Bidder must provide a summary of the following:</p> <ul style="list-style-type: none"> <li>• Full name and address of the contracting organization for the Supply Agreement.</li> <li>• Full name and address of the contracting organization for the Service Level Agreement (SLA).</li> <li>• Identity of parent guarantor if the proposing entity is a subsidiary, with authorization letter from parent guarantor.</li> <li>• Identify and contact information for individuals authorized to manage contract negotiations and execute contracts.</li> <li>• Three most recent fiscal years of balance sheets and income statements for contracting organization, and parent guarantor if applicable.</li> <li>• Disclosure of open or ongoing litigation.</li> </ul>
<b>13.</b>	<b>Exclusions and Clarifications</b>



	Bidder must itemize and explain any general, technical and / or commercial exclusions and clarifications to the Proposal.
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All Proposals must (a) include all information presented in the manner requested and comply with all requirements and conditions under this RFP; (b) remain in effect for at least ninety (90) days from the Proposal due date.

## 2.3 Form of Agreement Review

Review, redline and comments on the Form of Agreement<sup>4</sup> are mandatory. Vague comments e.g., To Be Discussed, will not be accepted. Any and all exceptions to these documents, must be clearly acknowledged and inserted in “tracked-changes” (red-lined) format using Microsoft Office or compatible and must accompany the Proposal. If there are no exceptions to documents, the words, “NO EXCEPTIONS,” must be stated at the top of each document.

Exhibit A-1	Scope of Work BESS
Exhibit A-2	Scope of Work EMS
Exhibit A-3	Division of Responsibilities
Exhibit B-1	Owner Supplied Equipment
Exhibit C-1	Site Description
Exhibit D-1	Single Line Diagram
Exhibit E-1	Performance Guarantees and Liquidated Damages
Exhibit F-1	Factory Acceptance Test Plans
Exhibit F-2	Cold Commissioning Test Plan
Exhibit F-3	Hot Commissioning Test Plan
Exhibit F-4	Unit Commissioning Test Plan
Exhibit F-5	BESS Substantial Completion Test Plan
Exhibit F-6	Annual Performance Testing
Exhibit G-1 <sup>5</sup>	Owner Insurance Requirements
Exhibit G-2 <sup>5</sup>	Contractor Insurance Requirements
Exhibit G-3	Contractor Insurance Certificates
Exhibit H-1 <sup>5</sup>	Form of Change Order Request
Exhibit H-2 <sup>5</sup>	Form of Change Order
Exhibit I	Reserved
Exhibit J-1	Project Schedule
Exhibit J-2	Monthly Reporting Template
Exhibit K-1 <sup>5</sup>	Owner Safety Plan
Exhibit K-2 <sup>5</sup>	Owner QA Plan
Exhibit K-3	Owner Code of Conduct
Exhibit K-4	Contractor Safety and Site Security Procedures / HSSE
Exhibit K-5	Contractor QA Plan
Exhibit K-6	Contractor Drug and Alcohol Policy
Exhibit L-1	Manufacturer Warranties

<sup>4</sup> The body of the Form of Supply Agreement is to be shared via an addendum to the RFP subsequent to the RFP’s initial release.

<sup>5</sup> This Exhibit is to be shared via an addendum to the RFP subsequent to the RFP’s initial release.

Exhibit M-1	Contractor Deliverables Matrix
Exhibit N-1 <sup>5</sup>	Payment Milestone Schedule
Exhibit N-2 <sup>5</sup>	Form of Request for Payment
Exhibit N-3 <sup>5</sup>	Form of Conditional Waiver and Release on Progress Payment
Exhibit N-4 <sup>5</sup>	Form of Unconditional Waiver and Release on Progress Payment
Exhibit N-5 <sup>5</sup>	Form of Conditional Waiver and Release on Final Payment
Exhibit N-6 <sup>5</sup>	Form of Unconditional Waiver and Release on Final Payment
Exhibit N-7 <sup>5</sup>	Invoicing Instructions
Exhibit N-8	Reserved
Exhibit N-9	Sales Tax Overview
Exhibit N-10	ACH/Wire Instructions
Exhibit O-1	NDA
Exhibit P-1	Form of Contractor Performance Security
Exhibit P-2	Form of Contractor Parent Guarantee
Exhibit Q-1	Owner Approved Vendor List
Exhibit Q-2	Key Contractor Personnel
Exhibit Q-3	Contractor Rates
Exhibit R	Reserved
Exhibit S	Reserved
Exhibit T-1	Owner Training Requirements
Exhibit U-1 <sup>5</sup>	Factory Acceptance Testing Completion Certificate
Exhibit U-2 <sup>5</sup>	BESS Commissioning Completion Certificate
Exhibit U-3 <sup>5</sup>	BESS Commercial Operation Certificate

Bidder must submit a PDF (portable document format) of the proposal together with supporting documentation and information on or before the RFP response deadline. Please do not submit any single email containing more than 20 MB of data. As an alternative, Proposers may provide proposals and/or supporting documentation and information via a secure file sharing website. Proposers using this option must submit an email by the RFP response deadline that contains access instructions to the proposed file sharing site. The Buyer reserves the right to reject any proposed file sharing site that it determines to be unsafe or insecure. Dropbox, Sharepoint, Box, or similar sites can be used for proposal submission.

## 3.0 Confidentiality and RFP Disclaimers

### 3.1 Confidentiality

Bidders shall have signed a non-disclosure agreement prior to receipt of this RFP. The Bidder agrees that this RFP, addenda, appendices, exhibits, and any response and discussion related thereto, are subject to the NDAs and constitute "Confidential Information" under the NDAs.

### 3.2 Award of Contract and Reservation of Rights

The Buyer reserves the right to modify, supplement or withdraw this RFP at any time, whether due to changes in law or otherwise, and including by issuing one or more addenda to this RFP during this solicitation, which addenda must become a part of this RFP.

No part of this RFP and no part of any subsequent correspondence by the Buyer, its members, affiliates, or their respective employees, shareholders, officers, directors, agents, attorneys and advisors must be taken as providing legal, financial or other advice or as establishing a contract or contractual obligation. Contractual obligations on the part of the Buyer will arise only if and when definitive agreements have been approved and executed by the appropriate parties having the authority to approve and enter into such agreements.

The Buyer reserves the right to request information that is not explicitly detailed in this document, obtain clarification from Bidders concerning proposals, conduct contract development discussions with selected Bidders, conduct discussions with members of the proposal evaluation team and other support resources as described in this RFP.

The Buyer reserves the right to accept one or more Proposals or reject any or all Proposals received in response to this RFP, and to waive informalities and irregularities in the Proposals received.

Under no circumstance must the Buyer be responsible for the costs of preparing any responses to this RFP.

This RFP does not commit the Buyer to enter into a contract, or award any services related to this RFP.

Any verbal communication with any employee of the Buyer, or any of its members, contractors, affiliates, or their respective employees, shareholders, officers, directors, agents, attorneys and advisors concerning this RFP is not binding and must in no way alter any term or condition of the RFP.

No work must commence until the Buyer signs a contract and the Bidder provides the necessary evidence of insurance or bonds as may be required in this RFP and the contract.

In the event the parties cannot negotiate and execute a contract within the time specified, the Buyer reserves the right to terminate negotiations with the selected Bidder and commence negotiations with another Bidder.

All proposals and other documents submitted will become the property of the Buyer.

### **3.3 Independent Contractor**

Bidder agrees and understands that, if selected, it and all persons designated by it to provide services in connection with a contract, are and must be deemed to be an independent contractors, responsible for their respective acts or omissions, and that the Buyer must in no way be responsible for the Bidder's actions, and that no Bidder will have any authority to bind others or to hold out to third parties, that it has such authority.

### **3.4 Equality of Information to Bidders**

Each Bidder has been supplied with the same RFP documents. Any questions received and answers provided will be issued to all Bidders unless the nature of the question and answer is proprietary to a given Bidder. In order for a question to be treated as proprietary it must be identified as such by the Bidder submitting.