

EVALUATION REPORT

PUBLICATION REF.: _____

Contents:

- Timetable
- Observers
- Evaluation
 - Preparatory session
 - Tender opening session
 - Administrative compliance
 - Technical compliance
 - Financial evaluation
- Conclusion
- Signatures

Annexes:

- Tender opening report and its annexes
- Administrative compliance grid
- Technical evaluation grids completed by the individual evaluators,
[incl Annex III Technical Offer]
- Attendance records
- [Clarification correspondence with tenderers]

1. Timetable

	DATE	TIME	VENUE
Preparatory session			
Deadline for the submission of tenders			
Tender opening session			
< Meeting 1 >			
< Meeting 2 >			
Etc.			

2. Observers

Name	Representing

3. Evaluation

Preparatory session

The Chairperson informed the Evaluation Committee of the scope of the proposed contract, identified the organisations responsible for preparing the tender dossier, and summarised the essential features of the tender procedure to date, including the evaluation grid published as part of the tender dossier.

Tender opening session

The Tender opening report is attached to this report. The Evaluation Committee only considered those tenders, which were found to be suitable for further evaluation following the tender opening session.

3.1 Administrative compliance

The Evaluation Committee used the administrative compliance grid included in the tender dossier to assess the compliance of each of the tenders with the administrative requirements of the tender dossier.

[If clarifications were requested for the submissions from any tenderers:

With the agreement of the other Evaluation Committee members, the Chairperson wrote to the following tenderers whose tenders required clarification, offering them the possibility to respond by <within a reasonable time limit fixed by the evaluation committee> (all correspondence is attached in the Annex indicated):

Tender envelope No	Tenderer name	[Lot number]*	Summary of exchange of correspondence

]

The completed Administrative compliance grid is attached. On the basis of this, the Evaluation Committee decided that the following tenders were administratively non-compliant and should not be considered further:

Tender envelope No	Tenderer name	[Lot number]*	Reason
			[The tenderer is in an exclusion situation.]
			[The tenderer has misrepresented or failed to supply the information required.]

Tender envelope No	Tenderer name	[Lot number]*	Reason
			[The tenderer was previously involved in the preparation of procurement documents, this entailing a distortion of competition which cannot be remedied otherwise.]
			[For procedures other than the international restricted one: The tenderer does not meet the selection criteria.]
			[<Other reason>]

3.2 Technical evaluation

Technical compliance

Each evaluator on the Evaluation Committee used the Technical evaluation grid included in the tender dossier to assess the compliance of each of the tenders with the technical requirements of the tender dossier. The completed Technical evaluation grids are attached.

[If clarifications were requested from any tenderers :

With the agreement of the other Evaluation Committee members, the Chairperson wrote to the following tenderers whose tenders required clarification, offering them the possibility to respond by <within a reasonable time limit fixed by the evaluation committee> (all correspondence is attached in the Annex indicated):

Tender envelope No	Tenderer name	[Lot number]*	Summary of exchange of correspondence

1

After discussing the individual conclusions of the Evaluators, the Evaluation Committee concluded that the following tenders were technically non-compliant and should not be considered further:

Tender envelope No	Tenderer name	[Lot number]*	Reason

Tender envelope No	Tenderer name	[Lot number]*	Reason

Only very exceptionally, subject to derogation, the technical requirements for the works will limit themselves to minima above which the tenderers can propose own solutions: only in such cases, the offers which comply with those minimum quality levels, should be technically scored. If so, add the following paragraph:

Technical scoring

Subsequently, the Committee evaluated the technically compliant offers in accordance with the technical evaluation grid (setting out the technical criteria, subcriteria and weightings) attached to the tender dossier.

The evaluators discussed their comments and their scores on the technical offers. The main strengths and weaknesses commonly agreed by the evaluators for each tender were as follows:

<u>Tender envelope No</u>	<u>Tenderer name</u>	<u>Strengths</u>	<u>Weaknesses</u>

The final average technical scores of the tenders subject to the technical scoring were as follows:

<u>Tender envelope No</u>	<u>Tenderer name</u>	<u>Lot no</u>	<u>Technical score</u>

1

3.3 Financial evaluation

Determination of the amount of the financial offers

The Evaluation Committee checked the technically compliant tenders for arithmetic errors.

Deleted: ¶

[If any arithmetic errors were found:

As stated in the instructions to tenderers, arithmetic errors were corrected on the following basis:

- Where there was a discrepancy between amounts in figures and in words, the amount in words prevailed;
- Except for lump-sum contracts, where there was a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted prevailed, except where the Evaluation Committee agreed that there was an obvious error in the unit price, in which case the total amount as quoted prevailed;
- Where unconditional discounts applied to financial offers for individual lots, the discount was applied to the financial offer.

The following arithmetic corrections were made:

Tender envelope No	Tenderer name	[Lot number]*	Stated financial offer [EUR] [<ISO code of national currency> only for indirect management]	Arithmetically corrected financial offer [EUR] [<ISO code of national currency> only for indirect management]

The arithmetically corrected financial offers were compared [for each lot] to identify the technically compliant tender with the lowest price [for that lot].]

[If a tender appears to have an abnormally low price in relation to the market for the supplies in question:

The tender submitted by <Tenderer name> appeared to have an abnormally low price in relation to the market for the supplies in question. Consequently, the Chairperson of the Evaluation Committee wrote to <Tenderer name> to obtain a detailed explanation for the low price proposed.

On the basis of the response of the tenderer, the Evaluation Committee decided to

EITHER [accept the tender because

[the tenderer used an economic production method]

[of the nature of the technical solution used]

[the financial offer reflected exceptionally favourable conditions available to the tenderer.]]

OR [reject the tender as the abnormally low price could not be justified on objective grounds.]]

[For each lot] The ranking of the tenders which were not excluded during the evaluation was as follows, in order of the arithmetically corrected financial offers:

Tender envelope No	Tenderer name	[Lot number] *	Financial offer [after arithmetical correction] [EUR] [<ISO code of national currency> only for indirect management]	Ranking

[If discounts are offered: Application of discounts:

Tender envelope No	Tenderer name	[Lot number] *	Financial offer [after arithmetical correction] [EUR] [<ISO code of national currency> only for indirect management]	Discount applicable [EUR] [<ISO code of national currency> only for indirect management]

Deleted: Tender envelope No

Deleted: [Lot number]*

Deleted: Tenderer name

* Delete column if there are no lots.]

[EDF only: If preferential rules are to be applied (applicable for works contracts of a value of less than EUR 5 000 000):

Preferences: for works contracts of a value of less than € 5 000 000, tenderers of the ACP states, provided that at least one quarter of the capital stock and management staff originates from one or more ACP states, will be granted a 10 % price preference during the financial evaluation where tenders of an equivalent economic, technical and administrative quality are compared.

[EDF only: (applicable for all works contracts):

Moreover, where two tenders are acknowledged to be equivalent, preference will be given:

- (a) to the tenderer of an ACP State; or
- (b) if no such tender is forthcoming, to the tenderer who:
 - allows for the best possible use of physical and human resources from ACP States,
 - offers the greatest subcontracting opportunities to ACP companies, firms or natural persons, or
 - is a consortium of natural persons, companies and firms from ACP States and the European Union.

The application of these rules concluded the following results:

[Lot number] *	Tender envelope No	Tenderer name	Financial offer [after arithmetical correction] [EUR] [<ISO code of national currency> only for indirect management]	Financial offer after applying preferential rules [EUR] [<ISO code of national currency> only for indirect management]

]

[Only very exceptionally, subject to derogation, if the works offers have been technically scored, add the following paragraph:

Financial scoring

The Evaluation Committee compared the financial offers to calculate their financial scores:

[Lot number] *	Tender envelope No	Tenderer name	Financial offer [EUR] [<ISO code of national currency> only for indirect management]	Financial score

1

[If any of the tenderers submitting the least expensive financial offer (after application of the preferential rules if any) for any of the lots has submitted a variant solution and provided that variants were allowed in the tender dossier for an amount equal or below to the price of the original tender:

Technical and financial evaluations were carried out of any variant solution submitted by tenderers, which had submitted the technically compliant tenders with the least expensive financial offers for each lot. The arithmetically corrected financial offers of the technically compliant variant solutions were as follows:

Deleted: ¶

Tender envelope No	Tenderer name	[Lot No] *	Stated variant financial offer [EUR] [<ISO code of national currency> only for indirect management]	Arithmetically corrected variant financial offer [EUR] [<ISO code of national currency> only for indirect management]	Arithmetically corrected original financial offer [EUR] [<ISO code of national currency> only for indirect management]

Deleted: ¶

3.4 Most economically advantageous tender

[Either: The most economically advantageous tender is the technically compliant tender with the lowest price.]

[Or, where exceptionally a technical scoring is given to the offers:

The most economically advantageous tender is the technically compliant tender with the best price-quality ratio. The best price-quality ratio is established by weighing technical quality against price on an for example 80/20, 70/30, 60/40, etc. : <...>basis:

Tender envelope number	Tenderer name	Overall score (Technical score x 0.80 + Financial score x 0.20)	Final ranking

4. Conclusion

Verification of documentary evidence for exclusion and selection criteria

The Evaluation Committee checked that the documentary evidence for exclusion and selection criteria for the most economically advantageous tender.

Deleted:

Deleted: with the highest overall scores were submitted

[If clarifications of documentary evidence were requested from the tenderer:

With the agreement of the other Evaluation Committee members, the Chairperson wrote to the tenderer offering them the possibility to respond by fax or email within a reasonable time limit fixed by the evaluation committee (all correspondence is attached in the Annex indicated):

<u>Tender envelope number</u>	<u>Tenderer name</u>	<u>Summary of exchange of correspondence</u>

1

The Evaluation Committee verified the documentary evidence for exclusion and selection criteria for the **most economically advantageous tender** and the documents were found [admissible] [not admissible].

Deleted: with the highest overall scores

If the documentary evidence is not found admissible the evaluation committee shall proceed to the second best technically and financially acceptable tender and verify their documentary evidence. If the documents are found admissible the conclusion may be to propose to award the contract to them.

The evaluation committee has ensured that the recommended tenderer or the members in the consortium are not in a situation of exclusion in the **Early Detection and Exclusion System**. [In indirect management if the contracting authority does not have access to the **Early Detection and Exclusion System** this has to be verified with the representative of the European Commission.]

Deleted: early warning system. {

Deleted: }

Consequently, the Evaluation Committee recommends that the contract(s) is(are) awarded as follows:

[Lot number] *	Tender envelope No	Tenderer name	Financial offer [after arithmetical correction and discounts] [EUR] [<ISO code of national currency> only for indirect management]	[Spare parts and/or consumables] [EUR] [<ISO code of national currency> only for indirect management]	Contract value [EUR] [<ISO code of national currency> only for indirect management]

* Delete column if there are no lots.

If the proportion of the contracts the tenderer intends to subcontract is known:

The proposed contractor intends to subcontract to third parties <insert proportion> of the contract.

Deleted: ¶

5. Signatures

	Name	Signature
Chairperson		
Secretary		
Evaluators		

[For competitive negotiated procedures where only one tender was received, the following must be inserted and the award decision template a14 is not to be used:]

Approved by the Contracting Authority:

Name & Signature:

Date:

[Approved by the European Commission (only in the case of ex-ante control by the European Commission)]

Name:

Title:

Signature:

Date:]

Not to be used for competitive negotiated procedures where only one tender was received

< Letterhead of the Contracting Authority >

AWARD DECISION

PUBLICATION REF: <Ref>

<Contract title>

[Lot number and lot title: <number and title>]

Maximum budget: <amount and currency>

The Contracting Authority, having examined the evaluation report prepared by the Evaluation Committee on the <date>, acknowledges that the Evaluation Committee recommends that <tenderer name> is awarded the contract with a contract value of [EUR] [<ISO code of the country of the Contracting Authority> only for indirect management] <amount>.

The Contracting Authority

[approves the evaluation report.]

Choose an option:

[Following the Evaluation Committee's recommendation, the Contracting Authority takes the decision to award the contract to <tenderer name>, the latter being the tenderer who provides the most economically advantageous tender while meeting the selection criteria.]

Or: [However, the Contracting Authority cannot follow the Evaluation Committee's recommendation for the following reason(s): <explain>. Therefore, the Contracting Authority takes the decision to award the contract to <tenderer name> which, while meeting the selection criteria <insert the reasons>.]

[For contracts awarded following a competitive dialogue: The recourse to the competitive dialogue was justified by the following circumstances <insert>.]

[has decided not to award the contract for the following reason(s): <explain>.]

Name and signature: _____

Date: _____

| [Approved by the European Commission only in the event of ex-ante control by the
| European Commission

| Name:

| Title:

| Signature:

| Date: 1
|