

< Letterhead of the Contracting Authority >

EVALUATION REPORT

PUBLICATION REF: <Ref>

<Contract title>

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

Maximum budget: <amount and currency>

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Annexes: Tender opening report
Administrative compliance grid
[Correspondence concerning clarification sought from tenderers]
Evaluation grids completed by the individual evaluators
Summary of average scores, technical and financial score and conclusion
[Interview records]

1. Timetable

	DATE	TIME	VENUE
< Meeting 1 >			
< Meeting 2 >			
< Interview session 1 >			
Etc.			

2. Observers

Name	Representing

3. Evaluation

Administrative compliance

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

If any tenderers were asked to provide clarification:

With the agreement of the other Evaluation Committee members, the Chairperson wrote to the following tenderers whose tenders required clarification, asking them to respond by fax or email within a reasonable deadline set by the evaluation committee (all correspondence is attached in the Annex indicated):

Deleted:]

Tender envelope number	Tenderer name	Summary of exchange of correspondence

1

The completed Administrative compliance grid is attached. On the basis of this, the Evaluation Committee decided that the following tenders had not met the administrative requirements and should be rejected:

Tender envelope number	Tenderer name	Reason
		<u>[The tenderer is in an exclusion situation.]</u>
		<u>[The tenderer has misrepresented or failed to supply the information required.]</u>
		<u>[The tenderer was previously involved in the preparation of procurement documents, this entailing a distortion of competition which cannot be remedied otherwise.]</u>
		<u>[For procedures other than the international restricted one: The tenderer does not meet the selection criteria.]</u>
		<u>[<Other reason>]</u>

Technical evaluation

All voting members of the Evaluation Committee used the evaluation grid in the tender dossier to assess the technical offers of the tenders that met the administrative requirements, as listed in the Tender opening report. The completed evaluation grids are attached to this report, together with a summary of the evaluators' comments on the strengths and weaknesses of the technical offers.

[If clarification were requested for the submissions from any tenderer: With the agreement of the other Evaluation Committee members, the Chairperson wrote to the following tenderers whose tenders required clarification, asking them to respond by fax or email within a reasonable deadline set by the evaluation committee (all correspondence is attached in the Annex indicated):

Tender envelope number	Tenderer name	Summary of exchange of correspondence

1

[If interviews were provided for in the tender dossier:

Based on the provisional average scores given by the Evaluation Committee to the technical offers, the key experts of the following tenderers (which achieved a provisional average score around 75 points or more) were called for interview:

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Tender envelope number	Tenderer name	Provisional average score

The interviews followed the standard format agreed by the Evaluation Committee. The records of the interviews are attached to this report.

On completion of the interviews, the members of the Evaluation Committee considered whether or not it was necessary to adjust the provisional scores given to the experts. Any changes are clearly indicated by the members on their evaluation grids with a note explaining why the change was made.]

[If references are verified:

Based on the provisional average scores given by the Evaluation Committee to the technical offers, the references of the key experts proposed by the following tenderers (which achieved a provisional average score around 75 points or more) were verified:

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Tender envelope number	Tenderer name	Provisional average score

Tender envelope number	Tenderer name	Provisional average score

The references which were verified are diplomas and documents proving experts' professional experience of EU projects, as mentioned in their CV, and/or other references provided by the tenderer.

On completion of the verification, the members of the Evaluation Committee considered whether or not it was necessary to adjust the provisional scores given to the experts. Any changes are clearly indicated by the members on their evaluation grids with a note explaining why the change was made.]

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:

Tender envelope number	Tenderer name	Strengths	Weaknesses

The final average scores of the administratively compliant tenders and the technical scores of the tenders that were subject to the technical evaluation were as follows:

Tender envelope number	Tenderer name	Final average score	Technical score (score/ <u>rejection</u>)	<u>Reason for rejection</u>
				[The tender does not comply with the minimum requirements specified in the procurement documents.]
				[For tenders awarded less than 75 points: The tender does not meet the minimum quality levels.]

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Only tenders with final average scores of at least 75 points qualify for the financial evaluation.

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Financial evaluation

The envelopes containing the financial offers of the technically **accepted** tenders were opened and all copies were initialled by the Chairperson and Secretary. The Evaluation Committee checked that the financial offers met the formal requirements of the tender dossier.

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[For fee-based contracts:

The Evaluation Committee checked the financial offers for arithmetic errors and that the provision for actual expenditure included in the tender dossier was correctly inserted in the budget breakdown. Any such errors were corrected.

For each financial offer, the contract value was compared to the maximum budget available for the contract.]

[If any financial offers were found not to meet the formal requirements, including exceeding the maximum budget available:

The following financial offers did not meet the formal requirements indicated (and were rejected on these grounds as shown):

Tender envelope number	Tenderer name	Formal requirement(s) not satisfied	Rejected? (YES / NO)

[For fee-based contracts:

The Evaluation Committee compared the total fees [and lump sums] in the remaining financial offers to calculate their financial scores:

Tender envelope number	Tenderer name	Total fees [and lump sums] [EUR] [<ISO code of national currency> only for indirect management]	Financial score

[For global price contracts:

The Evaluation Committee compared the global prices quoted in the remaining financial offers to calculate their financial scores:

Tender envelope number	Tenderer name	Global price [EUR] [<ISO code of national currency> only for indirect management]	Financial score

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

The tender submitted by <Tenderer name> appeared to have an abnormally low price in relation to the market for the services 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

[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.]

4. Conclusion

The composite evaluation of the technically compliant tenders was as follows:

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

[EDF only: If preference rules are used:

In respect of service contracts other than the European Commission's Framework contracts, when technical offers are evaluated, preference shall be given to tenders submitted by legal or natural persons of ACP States, either individually or in a consortium among them.

If two tenders are equivalent (overall scores are equal), preference is given:

- To the tenderer of an ACP State; or
- If there is no such tender, to the tenderer who:

- allows for the best possible use of physical and human resources of the ACP States;
- offers the greatest subcontracting possibilities to ACP companies, firms or natural persons; or

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tenders including in the technical offer 50% of experts from ACP states

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- is a consortium of natural persons, companies and firms from ACP States and the EU.

Application of these rules produced the following results:

Tender envelope number	Tenderer name	Overall score	Final ranking

Verification of documentary evidence for exclusion and selection criteria

The Evaluation Committee checked that the documentary evidence for exclusion and selection criteria for the tender with the highest overall scores were submitted.

If clarifications of documentary evidence were requested from the tenderer,

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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):

Tender envelope number	Tenderer name	Summary of exchange of correspondence

The Evaluation Committee verified the documentary evidence for exclusion and selection criteria for the tender with the highest overall scores and the documents were found [admissible] [not admissible].

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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.

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The evaluation committee has ensured that there is no detection of a recommended tenderer or members in their consortium 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 must be verified by a representative of the European Commission.

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Consequently, 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>.

5. Signatures

	Name	Signature
Chairperson		
Secretary		
Evaluators		

Approved by the Contracting Authority:

Name & Signature: Date:

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

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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: