# TEMPLATE SER 7: Evaluation Grid for Open Tenders

(For Procurements of EUR 150.000 – 299.999)

|  |
| --- |
| *Where you see:* **(Note:….)** *this is just a guidance for you and you shall delete these notes from the document.*  *Where you see <…> please enter information.*  *Options are marked* (Option:…). \*\*\*\*DELETE this Page prior to submitting the Request for Proposal\*\*\*\* |

**Evaluation Grid for Open Tenders**

This is a standard format for the evaluation of an Open Tender Procedure for Service Contracts. Note that the grid must reflect the criteria’s defined in the Tender Dossier – SER 6 articles A.16., Evaluation of Tenders and A.17. Award criteria.

Each member of the Procurement Committee fills in this grid individually and subsequently a common evaluation grid is compiled at the Procurement Committee meeting/evaluation meeting. Alternatively, the Committee when seating together completes a single grid.

This template is also available in an excel version in SER 7-1.

# Project: <name and reference>

**Contract: <contract title>**

**Tender reference numbers:** < >

**Closing date for submission of tenders**: < >

**Number of tenders received:** < >

**Date of evaluation:** : < >

The Procurement Committee met on this date and proceeded with the following evaluation.

**Part A. Administrative Compliance**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tender no.** | **1** | **2** | **3** | **4…** |
| **Tenderer name:** |  |  |  |  |
| **Date of receipt of tender:**  (if later than closing date, or not properly sealed: indicate REJECTED and stop evaluation) |  |  |  |  |
| **Tender Submission Form completed and duly signed without restrictions?** (if no, indicate REJECTED and stop the evaluation.) |  |  |  |  |
| **Eligibility** Indicate if there could be doubts about eligibility (bad reputation, breach of contract in previous contract, risk of conflict of interest, etc.)  If the supplier has not signed and stamped Annex 3, Tender Submission form, and thus subscribed to the “declarations” on eligibility, indicate REJECTED and stop evaluation |  |  |  |  |
| **Tender guarantee included – if applicable (yes/no)?** |  |  |  |  |
| **Overall decision on administrative compliance (accept/reject)?** |  |  |  |  |

If the Tenderer is not administratively complaint, reject the proposal and stop the evaluation. If the tender is compliant, proceed with the technical and financial evaluation.

**Part B. Technical Evaluation**

Adapt the following criteria and weights to those criteria and weights you have chosen in article A.16 of the Tender Dossier – according to the requirements of your project or the specific Contract (the following are options, based on the suggested criteria and weights in article A.16 in the Tender Dossier). Please ensure that the total technical score is equal to 100.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Tender no.:** |  | **1** | | **2** | | **3** | | **4…** | |
|  | **Maximum points** | **Score** | **Score after interview (if amended)** | **Score** | **Score after interview (if amended)** | **Score** | **Score after interview (if amended)** | **Score** | **Score after interview (if amended)** |
| **Expertise** | | | | | | | | | |
| (Tenderers economic and financial capacity) | <insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers technical capacity) | <insert no.> |  |  |  |  |  |  |  |  |
| (Extent to which any service would be subcontracted) | <insert no.> |  |  |  |  |  |  |  |  |
| (Availability of quality assurance procedures) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Organisation’s specialised knowledge and experience in the field of assignment and selected region) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers relevant academic qualifications) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers relevant experience in the field of assignment) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers experience in the region/country e.g. knowledge of local language, culture, administrative system, government etc.) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers proficiency in <insert language>) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers CSR related policies – e.g. HR policy, health and safety policy, energy policy, climate policy, Global Compact membership etc.) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Tenderers CSR related standards/certifications e.g. ISO 26000/50001/140000 or SA80000) | <Insert no.> |  |  |  |  |  |  |  |  |
| **Subtotal on expertise** | **<40>** |  |  |  |  |  |  |  |  |
| **Organisation and Methodology** | | | | | | | | | |
| (To what degree does the proposal show understanding of the task?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Have the Terms of Reference been addressed in sufficient detail?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Is the conceptual framework adopted appropriate for the task?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Is the sequence of activities and the planning logical, realistic and promising efficient implementation to the Contract?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Is the work plan adequate in responding to the Terms of Reference) | <Insert no.> |  |  |  |  |  |  |  |  |
| **Subtotal on Organisation and Methodology** | **<40>** |  |  |  |  |  |  |  |  |
| **(Option: Expertise of Key expert) (Note: delete if single candidate)** | | | | | | | | | |
| (Relevant academic qualifications) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Relevant experience in the field of assignment) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Experience in the region/country e.g. knowledge of local language, culture, administrative system, government etc.) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Proficiency in <insert nation> language) | <Insert no.> |  |  |  |  |  |  |  |  |
| **Subtotal on Key expert expertise** | **<20>** |  |  |  |  |  |  |  |  |
| **TOTAL TECHNICAL SCORE** | **100** |  |  |  |  |  |  |  |  |

**Part C: Financial Evaluation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tender no.:** | **1** | **2** | **3** | **4...** |
| **PRICE OFFERED** |  |  |  |  |
| **FINANCIAL SCORE[[1]](#footnote-2)** |  |  |  |  |

**Overall result of Evaluation:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tender no.:** | **1** | **2** | **3** | **. 4...** |
| **OVERALL SCORE[[2]](#footnote-3)** |  |  |  |  |
| **OVERALL RANKING** |  |  |  |  |
| **SUMMARY**  Award of contract or reason for rejection:  Please verify the selected supplier(s)’s eligibility as per DCA Counter Terrorism Policy, by checking the UN Security Council, EU and donor required sanctions lists |  |  |  |  |

As a consequence of the evaluation, the Procurement Committee recommends that the Service Contract for <....> be awarded <name of Tenderer>.

With my signature, I hereby declare that I agree to participate in the Procurement Committee and in the evaluation of the above-mentioned procurement(s). With my signature, I confirm that I have familiarity with the information available to date concerning the donor rules and regulations and the procurement procedures described in the Procurement Manual. I further declare that I shall execute my responsibilities honestly, fairly and impartial.

I am independent of all parties which stand to gain from the outcome of this evaluation. To the best of my knowledge and belief, there are no facts or circumstances, past or present that could arise in the foreseeable future, which might call into question my independence in the eyes of any party. Should it become apparent during the course of this evaluation that such a relationship exists or has been established, I will immediately cease to participate in the Procurement Committee.

I agree to hold in trust and confidence any information or documents ("confidential information") disclosed to me, discovered by me, or prepared by me in the course of or as a result of the procurement procedure and agree that it shall be used only for the purposes of the procurement procedure and shall not be disclosed to any third party. I also agree not to retain copies of any written information or prototypes supplied. I will not disclose any confidential information to any employee or expert unless they agree to execute and be bound by the terms of this declaration.

|  |  |  |  |
| --- | --- | --- | --- |
| **Approved by the Procurement Committee** | | | |
| **Signature:** |  | **Date:** |  |
| **Name:** |  | **Position:** |  |
|  |  |  |  |
| **Signature:** |  | **Date:** |  |
| **Name:** |  | **Position:** |  |
|  |  |  |  |
| **Signature:** |  | **Date:** |  |
| **Name:** |  | **Position:** |  |

1. Use the following formula: SF = 100 x Fm/F (SF = the financial score; Fm = the lowest price; F = the price of the proposal under evaluation) [↑](#footnote-ref-2)
2. Use the following formula: technical score x ‹0.75› + financial score x ‹0.25› = overall score [↑](#footnote-ref-3)