# ANNEX SER 7: Evaluation Grid for Open Tender Procedure

This is a standard format for the evaluation of an Open Tender Procedure for Service Contracts.

Note that the grid must reflect the criteria chosen 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 grid is compiled. Once the decision has been made an evaluation report shall be drafted. A template is contained in GEN 15-4: Evaluation Report for Open Tenders.

# 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 meets on this date and proceeds with the following evaluation. All members of the Procurement Committee (and observers, if any) have signed Declarations of Impartiality and Confidentiality, which shall be attached to this evaluation grid.

**Part A. Administrative Compliance**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tender no.** | **1** | **2** | **3** | **4…** |
| **Tenderers name:** |  |  |  |  |
| **Date of receipt of tender:**(if later than closing date: indicate REJECTED and stop evaluation) |  |  |  |  |
| **Tender Submission Form completed and duly signed without restrictions?** (if no, indicate REJECTED and stop the evaluation.) |  |  |  |  |
| **Declarations included (yes/no)? (**If the supplier has not 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. Substantial compliance with Tender Dosser and 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 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** | **Score** | **Score** |
| **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>** |  |  |  |  |
| **Key expert evaluation (if key experts are included in the proposal)** |
| (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**  | **<20>** |  |  |  |  |
| **TOTAL TECHNICAL SCORE** | **100** |  |  |  |  |

**Part C: Financial evaluation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tender no.:** | **1** | **2** | **3** | **4...** |
| **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: |  |  |  |  |

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

**Signatures by members of the Procurement Committee and Secretary**

|  |  |  |
| --- | --- | --- |
| **Title**  | **Name** | **Signature** |
|  |  |  |
|  |  |  |
|  |  |  |

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)