EVALUATION REPORT

**PUBLICATION REF.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contents:** Timetable

Observers

Evaluation

Preparatory session

Tender opening session

Administrative compliance

Technical compliance

Financial evaluation

Conclusion

Signatures

**Annexes:**

[Appointment of Opening and Evaluation Committees with the declarations of impartiality and confidentiality

[Electronic submission: Record of opening of submissions generated from e-Submission and the list of tenderers’ representatives (from Annex D6)]

[Paper submission: Tender opening record and its annexes  
Administrative compliance grid

[Correspondence regarding Declaration on Honour and supporting documents on exclusion and selection criteria from tenderers]  
Technical evaluation grids completed by the individual evaluators,   
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 record 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 number** | **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 number** | **Tenderer name** | **[Lot number]\*** | **Reason** |
| --- | --- | --- | --- |
|  |  |  | [The tenderer is in an exclusion situation.] |
|  |  |  | [The tenderer has misrepresented or failed to supply the information required.] |
|  |  |  | [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 No** | **Tenderer name** | **[Lot number]\*** | **Summary of exchange of correspondence** |
|  |  |  |  |
|  |  |  |  |
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]

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 number** | **Tenderer name** | **[Lot number]\*** | **Reason** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

[if offers be technically scored.:

**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:

| **Tender number** | **Tenderer name** | **Strengths** | **Weaknesses** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

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

| **Tender number** | **Tenderer name** | **Lot no** | **Technical score** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

**]**

**3.3 Financial evaluation**

**Determination of the amount of the financial offers**

The evaluation committee checked the technically compliant tenders for arithmetic errors.

[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 number** | **Tenderer name** | **[Lot number]\*** | **Stated financial offer [EUR] [<ISO code of national currency>]** | **Arithmetically corrected financial offer [EUR] [<ISO code of national currency>]** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

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 number** | **Tenderer name** | **[Lot number]\*** | **Financial offer** [after arithmetical correction] **[EUR] [<ISO code of national currency>]** | **Ranking** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

[If discounts are offered: Application of discounts:

| **Tender number** | **Tenderer name** | **[Lot number]\*** | **Financial offer** [after arithmetical correction] **[EUR] [<ISO code of national currency>]** | **Discount applicable**  **[EUR] [<ISO code of national currency>]** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

**\*** Delete column if there are no lots.]

[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 number** | **Tenderer name** | **Financial offer [EUR] [<ISO code of national currency> only for indirect management]** | **Financial score** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

]

**3.4 Award criteria**

[Either: The technically compliant tender with the lowest price.]

[Or, 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 number** | **Tenderer name** | **Overall score** (Technical score x 0.80 + Financial score x 0.20) | **Final ranking** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

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**4. Conclusion**

**Correspondence regarding the Declaration on Honour and documentary evidence for exclusion and selection criteria**

[The requirement to submit an **original** Declaration on Honour on exclusion criteria and selection criteria is only **applicable** in case of paper submission.]

[Email below is not to be used for the simplified procedure **if** the original Declaration on Honour and documentary evidence on exclusion and selection were submitted with the tender (i.e. they were deemed necessary and requested in the Instructions to Tenderers)]

[Email below is not to be used in case of a local open procedure **if** the original Declaration on Honour and documentary evidence on exclusion and selection were submitted with the tender (i.e. they were deemed necessary and requested in the Instructions to Tenderers)]

An email requesting the original Declaration on Honour on exclusion criteria and selection criteria, if applicable, and copies of documentary evidence for exclusion and selection criteria for the most economically advantageous tender was sent on <specify the date>.

[The text of the email to the tenderer offering the most economically advantageous tender must at least contain the following information:

Please send to <address of the Contracting Authority> or/and <email address of the Contracting Authority>.

1. The Declaration(s) on honour on exclusion criteria and selection criteria.

[Paper submission: Please submit the original Declaration(s) on Honour, a copy of which has been submitted by you with the tender form. This includes the original signed Declaration on honour of every member of the consortium and any capacity providing entity or subcontractor (if applicable). Please use a reliable courier service or registered mail to avoid any delays or loss of the documents. The envelope, clearly mentioning the reference of the call for tenders and, if applicable, the e-Submission ID of the tender must be marked as "CALL FOR TENDERS – NOT TO BE OPENED BY THE INTERNAL MAIL DEPARTMENT".

If you use the Qualified Electronic Signature (QES) for the signing of documents, please sign the Declaration(s) on honour on exclusion and selection criteria with QES and send by email.]

[Electronic submission: Tenderers must keep the originals of the Declaration on Honour for control purposes and must provide them to the contracting authority upon request.]

[**Documentary evidence** **on** **exclusion criteria** is requested for all tender procedures above EUR 5 000 000. For tender procedures below EUR  5 000 000, the contracting authority may, if it has doubts about whether the tenderer to whom the contract is to be awarded is in one of the situations leading to exclusion, require the tenderer to provide the documentary evidence on exclusion criteria:

2. Documentary evidence for the exclusion criteria. “Please send by email or by courier service or registered mail an admissible proof or statement usual under the law of the country in which the tenderer (including all consortium members, as well as subcontractors and capacity providing entities, if applicable) is established showing that the tenderer does not fall into any of the exclusion situations listed in point 18 of Annex II of the Financing Agreement between the European Commission and the partner country. The date on the evidence or documents provided must be no earlier than 1 year before the date of submission of the tender. [You] [Your firm] [each consortium member] must, in addition, provide a statement that the situation has not been altered in the period that has elapsed since the evidence in question was drawn up.”

If the nature of your entity is such that it cannot fall into the exclusion situations and/or cannot provide the documents indicated above (for instance, national public administrations and international organisations), please provide a declaration explaining this situation.

The contracting authority may waive the obligation of any tenderer to submit the documentary evidence referred to above if such evidence has already been submitted for the purposes of another procurement procedure, provided that the issue date of the documents does not exceed one year and that they are still valid. In this case, please declare that the documentary evidence has already been provided in a previous procurement procedure, indicating its title and reference number, and provide confirmation that the situation has not changed. ]

[**Documentary evidence** **on** **selection criteria** is requested for all tender procedures above EUR 5 000 000. For tender procedures below EUR 5 000 000: the contracting authority may, depending on its assessment of the risks, decide not to require proof for selection criteria, but then no pre-financing must be made, see Section 2.6.11. of the practical guide:

3. Documentary evidence for selection criteria.  The documentary evidence of the financial and economic capacity and the technical and professional capacity according to the selection criteria specified in the contract notice has to be provided by email or by courier service or registered mail.]

We would be grateful to receive the requested documents at the latest by <date>.

]

The original (if applicable) signed declaration(s) on honour on exclusion and selection criteria for the most economically advantageous tender, including the declarations of every member of the consortium and any capacity providing entity or subcontractor (if applicable), and documentary evidence on compliance with exclusion and selection criteria were submitted on <specify the date>.

[If clarifications on 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):

|  |  |  |
| --- | --- | --- |
| **Tender number** | **Tenderer name** | **Summary of exchange of correspondence** |
|  |  |  |

]

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].

If the documentary evidence is not found admissible, the evaluation committee will proceed as stated above with the second best technically compliant tender with the best price-quality ratio, using the email text template provided above to request the original (if applicable) Declaration on Honour and the documentary evidence. Upon receipt and verification of all requested documents, the evaluation committee may recommend awarding the contract to the second best tenderer.

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.]

The evaluation committee has ensured that there is no detection of a recommended tenderer or members in their consortium in the lists of EU restrictive measures in [www.sanctionsmap.eu](http://www.sanctionsmap.eu) .

Consequently, the evaluation committee recommends that the contract(s) is(are) awarded as follows:

| **[Lot number]\*** | **Tender No** | **Tenderer name** | **Financial offer** [after arithmetical correction and discounts] **[EUR] [<ISO code of national currency>]** | **[Spare parts and/or consumables]**   **[EUR] [<ISO code of national currency>]** | **Contract value**   **[EUR] [<ISO code of national currency>]** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**\*** 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.]

**5. Signatures**

|  |  |  |
| --- | --- | --- |
|  | **Name** | **Signature** |
| **Chairperson** |  |  |
| **Secretary** |  |  |
| **Evaluators** |  |  |
|  |  |  |
|  |  |  |

**[**For simplified procedure where only one tender was received the following must be inserted and the award decision template is not to be used:

**Awarded to the tenderer recommended by the Evaluation committee:**

**Name & signature: Date:**

**]**