PUBLICATION REF: <Ref>  
  
<Contract title>

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

Maximum budget: <amount and currency>

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[Paper submission: Tender opening record and its annexes]  
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[Correspondence concerning clarification sought from tenderers]  
[Correspondence regarding Declaration on Honour and supporting documents on exclusion and selection criteria 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 contracting authority wrote to the following tenderers whose tenders required clarification, asking them to respond by email within a reasonable deadline set by the evaluation committee (all correspondence is attached in the annex indicated):

|  |  |  |
| --- | --- | --- |
| **Tender number** | **Tenderer name** | **Summary of exchange of correspondence** |
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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 number** | **Tenderer name** | **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 restricted procedure: The tenderer does not meet the selection criteria.] |
|  |  | [<Other reason>] |

**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. 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 contracting authority wrote to the following tenderers whose tenders required clarification, asking them to respond by email within a reasonable deadline set by the evaluation committee (all correspondence is attached in the annex indicated):

|  |  |  |
| --- | --- | --- |
| **Tender number** | **Tenderer name** | **Summary of exchange of correspondence** |
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[If interviews were provided for in the tender dossier:

Based on the provisional average technical score 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:

| **Tender number** | **Tenderer name** | **Provisional average technical score** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
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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.]

[When 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 an average technical score around 75 points or more) were verified:

| **Tender number** | **Tenderer name** | **Provisional average technical score** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
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The references which were verified are diplomas and documents proving the experts' professional experience, 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 change is 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 number** | **Tenderer name** | **Strengths** | **Weaknesses** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
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The final average technical scores of the administratively compliant tenders and the weighted technical scores of the tenders that were subject to the technical evaluation were as follows:

| **Tender number** | **Tenderer name** | **Final average technical score** | **Weighted technical score (score/rejection)** | **Reason for rejection** |
| --- | --- | --- | --- | --- |
|  |  |  |  | [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.] |

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

**Financial evaluation**

[Paper submission: 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.

[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 not meeting 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 below):

| **Tender number** | **Tenderer name** | **Formal requirement(s) not satisfied** | **Rejected? (YES / NO)** |
| --- | --- | --- | --- |
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[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 number** | **Tenderer name** | **Total fees [and lump sums] [EUR] [<ISO code of national currency>]** | **Financial score** |
| --- | --- | --- | --- |
|  |  |  |  |
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[For global price contracts:

The evaluation committee compared the global prices quoted in the remaining financial offers to calculate their financial scores:

| **Tender number** | **Tenderer name** | **Global price [EUR] [<ISO code of national currency>]** | **Financial score** |
| --- | --- | --- | --- |
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[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 number** | **Tenderer name** | **Overall score** (Weighted technical score x 0.80 + Financial score x 0.20) | **Final ranking** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

**Correspondence regarding** **the Declaration(s) on honour and documentary evidence for exclusion and selection criteria**

[“Point 3 - Documentary evidence for selection criteria” of the email below is not to be used for the simplified procedure **if**  the Contracting Authority decided in the Instructions to Tenderers not to request the documentary evidence on selection criteria]

An email requesting [for paper submission only: the original signed Declaration on honour on exclusion and selection criteria and] documentary evidence for exclusion and, if applicable, selection criteria, for the tender with the highest overall scores was sent on <specify the date>.

[The text of the email to the tender with the highest overall score 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 signed Declaration(s) on honour of which a copy has been submitted by you with the request to participate form/the tender submission form. The original signed Declaration(s) on honour must be submitted for 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 eSubmission ID of the tender submitted, 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 requiredfor all tender procedures with a value above EUR 300 000. For tender procedures below EUR 300 000, 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 evidence on exclusion criteria.

2. Documentary evidence for the exclusion criteria. Please send by email or by courier service or registered mail the documentary evidence demonstrating that you do 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 admissible proof or statement should be under the law of the country in which you (including all consortium members, as well as subcontractors and capacity providing entities, if applicable) are established in accordance with the undertaking in the declaration(s) which was included in your tender. 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 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 confirm that the situation has not changed.]

[**Documentary evidence** **on** **selection criteria** is requested for all tender procedures with a value above EUR 300 000. For tender procedures below EUR 300 000: 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.

3. Documentary evidence for selection criteria.  Please send by email or by courier service or registered mail 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.

Specifically for technical and professional capacity the documentary evidence has to be provided for the following references <specify for which references in the request to participate form – point 6 Experience – evidence has to be submitted and introduce the information from column ‘Short-listed on experience ref. N°’ as mentioned on the longlist.> ]

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 tender with the highest overall scores, 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 further 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** |
|  |  |  |

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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].

If the documentary evidence is not found to be admissible, the evaluation committee will proceed as stated above with the second best technically and financially acceptable tender, using the email text template provided above to request the original (if applicable) Declaration on honour and the documentary evidence for exclusion and selection criteria. 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 there is no detection of a recommended tenderer or members of their consortium in the lists of EU restrictive measures in [www.sanctionsmap.eu](http://www.sanctionsmap.eu) .

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>] <amount>.

**5. Signatures**

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