

The maximum scores must correspond to the evaluation grid included in the tender dossier

## EVALUATOR'S GRID

To be completed for each tender by each evaluator

	Maximum	Initial assessment	Revised assessment [before interviews/ references *]	Revised assessment [after interviews/ references *]
<b>Organisation and methodology</b>				
[Rationale]	[10] [<other>]			
[Strategy]	[30] [<other>]			
[Back-up function]	[5] [<other>]			
[Involvement of all members of the consortium]	[5] [<other>]			
[Timetable of activities, including the number of expert days proposed]	[10] [<other>]			
<b>Total score for Organisation and methodology</b>	[60] [<insert a score between 60 and 40>]			
<b>Key experts</b>				
<Key expert 1> (Max [20][<tot.>] points)				
[Qualifications and skills]	[10] [<other>]			
[General professional experience]	[10] [<other>]			
[Specific professional experience]	[20] [<other>]			
<b>Total score for Key experts</b>	[40] [<insert a score between 40 and 60>]			
<b>Overall total score</b>	<b>100</b>			

\* In the case that interviews are held and references are verified

<b>Strengths</b>	
<b>Weaknesses</b>	

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**Evaluation performed by:**

<b>Name</b>	
<b>Signature</b>	
<b>Date</b>	

## **INSTRUCTIONS AND GUIDELINES TO EVALUATORS FOR A FEE BASED CONTRACT**

Each evaluator must make an initial assessment of the technical offers and award scores on each sub-criterion according to his/her assessment.

To this end, all evaluators should independently from each other carry out the evaluation of the technical offers in a consistent manner by applying the same methodology, interpretation and understanding. This does not necessarily mean that the scores of two different evaluators are expected to be identical, but rather that each evaluator applies the same standards and provides a well substantiated opinion supporting his/her individual scores. To their assistance the guidelines below should be used.

Each evaluator should be able to justify his/her assessment and scores in a meeting of the Evaluation Committee. The justifications must relate to the description of the project needs in the terms of reference and, for the key experts, to the profile descriptions included in it. Evaluators must therefore make comments in the strengths and weaknesses boxes.

The assessments made will be discussed in the evaluation meeting(s) and each evaluator may make adjustments to the initial assessments after this discussion.

If interviews are held and/or references are verified, each evaluator may revise his/her assessment of individual key experts on the basis of these.

Any adjustments or revised score must be justified and recorded in the evaluation report.

### **Evaluation of the involvement of all members of the consortium:**

The tender shall include a description of the input from each member of the consortium and the distribution and interaction of tasks and responsibilities between them. If a tender is made by an individual company and not by a consortium, the maximum points should be allocated to "involvement of the consortium".

### **Evaluation of the back-up function:**

The tenderer shall give a description of the support facilities (back-stopping) that they will provide to their team of experts during the implementation of the contract.

The description of the back-up function should include a list of staff, units, capacity of permanent staff regularly intervening as experts on similar projects, provision of expertise in the region/country of origin as well as partner countries, organisational structure, etc. which are supposed to ensure that function, as well as the available quality systems and knowledge capitalisation methods and tools, within the respective members of the consortium

A permanent capacity of staff regularly intervening as experts on similar projects should be considered as an advantage for providing support to experts on the ground. By contrast, a service contractor which is exclusively employing free-lance experts (i.e. non-permanent) should be considered to have a less robust backstopping capacity.

If the tenderer is providing expertise in its region/country of origin as well as in partner countries it may be considered as an ability to disseminate innovation.

If the tenderer has design, research, laboratory or even innovation function, or whether it collaborates with academic research centre, it may be considered an advantage.

## **Evaluation of experts:**

The summary table below should be understood as a guideline for the evaluator's judgement on an individual line of the evaluation grid.

Note that civil servants and other staff of the public administration of the partner country shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring, on any potential interference or conflict of interest of the proposed expert in his/her function as expert and his/her present or previous functions working as civil servant, as well as proof that the expert is seconded or on personal leave.

Key-experts should be scored against the requirements stated in the Terms of Reference. The tenderers must provide documentary proof for the key experts proposed. This includes copies of the diplomas referred to in the CV and employers' certificates or references proving the professional experience stated in the CV. If missing proofs are requested, as a clarification of the technical offer, it should only be for the relevant experience and diplomas which are among the requirements in the Terms of Reference. Only diplomas and experience supported by documentary proof should be taken into account

For the key experts, the 60% could serve as a guideline. This means that when an expert is technically acceptable on a particular criterion (when he/she fulfils the minimum requirement for that criterion), 60% of the maximum score foreseen for that criterion should be allocated. If the expert exceeds the minimum requirement for that criterion, a percentage between 61 and 100% of the maximum score foreseen for that criterion should be allocated, depending on by how much the expert exceeds the minimum requirement.

The key experts must fulfil the minimum requirement for all of the criteria. If any of the key experts do not fulfil the minimum requirements in any criterion after the revised assessment (that takes place after the interviews, if any) the offer should be rejected.

The Evaluation Committee should as standard practise proceed to check the past experience of key experts (including checking references of employers or Contracting Authorities included in the CVs) in order to confirm the information provided in the CV with regard to the award criteria (e.g. that the services provided in the past were successfully completed).

The Contracting Authority (and first, the evaluators) must ensure at all times an objective evaluation of the tenders and the principles of equality of treatment and non discrimination must be respected. For that reason, these contacts will only be used to confirm the accuracy of the information provided by the expert relating to his past experience and will not be used to introduce subjective elements in the evaluation of the experts/tender.

When as a consequence of these checks, it is proven that the CV does not reflect reality and hence these may affect the evaluation of the key expert by the Committee, e.g. by deducting points for the concerned award criterion, evidence that these checks have been carried out and its result must be duly substantiated (e.g. minutes of phone conversations and exchange of letters or e-mails; evaluations in database) and reflected in the report of the Evaluation Committee.

For the non-key experts the only aspect to be considered is whether the number of working days estimated for each month for each type of expert proposed in the Organisation and Methodology are sufficient for the requirements of the Terms of Reference to be achieved. This is judged on the basis of the profiles identified in the Terms of Reference and/or the Organisation and Methodology.

Note that only tenders with average scores of 75 points or more are considered technically acceptable and qualify for the financial evaluation.

<b>total points</b>	<b>average 60 %</b>	<b>&gt;</b>	<b>good &gt; 80 %</b>	<b>excellent &gt;95 %</b>
30	18 - 23		24 - 28	29 - 30
25	15 - 19		20 - 23	24 - 25
24	15 - 19		20 - 22	23 - 24
23	14 - 18		19 - 21	22 - 23
22	14 - 17		18 - 20	21 - 22
21	13 - 16		17 - 19	20 - 21
20	12 - 15		16 - 18	19 - 20
19	12 - 15		16 - 18	19
18	11 - 14		15 - 17	18
17	11 - 13		14 - 16	17
16	10 - 13		13 - 15	16
15	9 - 11		12 - 14	15
14	9 - 11		12 - 13	14
13	8 - 10		11 - 12	13
12	8 - 9		10 - 11	12
11	7 - 8		9 - 10	11
10	6 - 7		8 - 9	10
9	6 - 7		8	9
8	5 - 6		7	8
7	5		6	7
6	4		5	6
5	3		4	5
4	3		4	4
3	2		3	3
2	2		2	2