|  |  |
| --- | --- |
| LOGO | *[Name of Employer / Purchaser]*ER2: Tender Evaluation Report |
| Tender No:       |
| **Title:**      (version 1: June 2016) |

|  |
| --- |
| The National Treasury Standard for Infrastructure Procurement and Delivery Management requires that:* + - 1. The evaluation report shall be prepared by one or more persons who are conversant with the nature and subject matter of the procurement documents or the framework contract, and who are registered as:
1. a professional architect or professional senior architectural technologist in terms of the Architectural Profession Act;
2. a professional engineer or professional engineering technologist in terms of the Engineering Profession Act;
3. a professional landscape architect or a professional landscape technologist in terms of the Landscape Architectural Profession;
4. a professional project manager or a professional construction manager in terms of the Project and Construction Management Professions Act; or
5. a professional quantity surveyor in terms of the Quantity Surveying Profession Act.
	* + 1. Submissions shall be evaluated strictly in accordance with the provisions of the procurement documents (see Annex C of SANS 10845-3 and Annex C of SANS 10845-4, as relevant). Where quality is evaluated, at least three persons who satisfy the requirements of 4.2.3.2 shall undertake such evaluation. Quality shall be scored in terms of the prompts for judgement, with fixed scores assigned to each prompt, either individually and averaged or collectively, as appropriate.
			2. Evaluation reports shall be prepared in accordance with the content headings and relevant guidelines contained in Tables 5 or 6, with modifications as necessary where a two-envelope, two-stage process or competitive negotiation procedure is followed. Such reports shall contain extracts from the procurement documents which are linked to the evaluation of submissions, such as eligibility criteria, criteria associated with evaluation methods, preferencing, quality criteria (including prompts for judgement), the method by which tenders are reduced to a common base and lists of returnable documents. Such references shall enable those who are tasked with making decisions based on these documents to do so without having to refer back to submissions in order to understand the content of the report.
			3. An evaluation report which recommends the award of a contract shall contain in annexures the reports, if any, of prior processes, e.g. a call for an expression of interest, a round in a competitive negotiation procedure or a stage in a competitive selection procedure.

**Table 6: Content of an evaluation report relating to the solicitation of tender offers**  |

| **Section heading** | **Subsection heading** | **Guidelines for the preparation of content** |
| --- | --- | --- |
| **1** | **Summary** | - | - | Provide an overview of the parameters associated with the solicitation of the tender, preferably in tabular form, including the following as relevant:* Contract / Project / Tender number
* Contract description
* Contract duration
* Purpose of tender
* Contracting strategy, pricing strategy, form of contract and targeting strategy
* Procurement procedure and method of tender evaluation
* Tender validity expiry date
* Alternative tenders (not permitted or state conditions under which permitted)
* Media in which advertisement was placed, if not a nominated or qualified competitive selection procedure or a restricted competitive negotiations procedure
* Date of advertisement(s)
* Date from which documents were available
* Details of clarification meeting, including date and place, if any
* Tender closing date
* Number and title of addenda issued
* Number of tenders received
* Number of responsive tenders
* Recommended tender(s)
* Cost estimate (budget), unless a framework contract
* Lowest responsive and realistic tender used for comparative purposes (tender price, specific goals, etc.)
 |
| **2** | **An overview of the tender evaluation process** | - | - | Provide an overview of the procurement process, indicating the eligibility criteria that were applied and the evaluation criteria. State specific goals and points relating to preferences, as well as any quality evaluation criteria, prompts for judgement and weightings relating thereto.Reproduce the list of returnable documents.Provide an overview as to how the quality aspects of the tender were scored.Record that those involved in the evaluation of tenders have no conflicts of interest or have declared any conflict of interest that they may have, and the nature of such conflict. |
| **3** | **Tender evaluation process** | **3.1** | **Tender offers received** | List the tender offers that were received. Describe any noteworthy events regarding the opening of submissions, e.g. the returning of late tenders and the declaring of submissions non-responsive on the grounds that they were not received in the prescribed manner. |
| **3.2** | **Completeness of tenders received** | Compare tender submissions received against list of returnable documents. State if any tender submissions received were incomplete and indicate what was not complete. Indicate what steps were taken to make incomplete tenders complete, only where this does not affect the competitive position of the tenderer in question. List all communications with tenderers. Confirm if tenderers took into account addenda, if any, in their tender submission. |
| **3.3** | **Responsiveness of tenderers** | Identify which of the tenders received were non-responsive and provide clear reasons for declaring such tenders to be non-responsive. |
| **3.4** | **Evaluation of tender offers** | Record the manner in which tenderers were reduced to a common basis:Record preferably in a tabular form:* the scores for each of the evaluation criteria;
* the total score (excluding those who failed to score above a threshold);
* the pricing parameters that were tendered to enable compensation events to be evaluated of contractors to be paid in cost reimbursable or target cost contract.

Provide reasons for not granting a preference or considering a financial offer to be unrealistically low. |
| **3.5** | **Reasons for disqualification on the grounds of corrupt or fraudulent practice** | State reasons if applicable.  |
| **3.6** | **Compliance with legal requirements** | Confirm as relevant that tenderers are not barred from participation, tax matters are in order, are registered, etc. |
| **3.7** | **Acceptability of preferred tenderer** | State any reasons why the tenderer with the highest points should not be considered for the award of the tender, e.g. commercial risk, restrictions, lack of capability and capacity, legal impediments, etc.Also state any arithmetical corrections that have been made. |
| **4** | **Outcome****of the evaluation** | **-** | **-** | Make a recommendation for the award of the tender and state any qualifications / conditions associated with such an award.Record the names and qualifications of those who performed the evaluation. |
| **5** | **Confirmation of recommendations**  | **-** | **-** | Make provision for the recommendations for the award of the tender to be confirmed or amended.  |

**Section 1: Summary[[1]](#footnote-1)**

|  |  |
| --- | --- |
| **Tender / Contract / Project No.** |  |
| **Contract / project description** |  |
| **Contract duration** |  |
| **Purpose of the tender** |  |
| **Contracting strategy, pricing strategy, form of contract and targeting strategy** |  |
| **Procurement procedure and method of tender evaluation** |  |
| **Tender validity expiry date** |  |
| **Alternative tenders**  | Not permitted / Permitted under the following conditions |
| **Media in which advertisement was placed** |  |
| **Advertisement date(e)** |  |
| **Date from which documents were available** |  |
| **Estimated value of contract or orders which are likely to be awarded during the term of the contract[[2]](#footnote-2)** |  |
| **Details of clarification meeting**  | Date:Place: |
| **Tender closing date** |  |
| **Number and title of addenda issued** |  |
| **Number of tenders received** |  |
| **Number of responsive tenders** |  |
| **Recommended tenderer(s)** |  |
| **Cost estimate (budget)[[3]](#footnote-3)** |  |
| **Lowest responsive and realistic tenderer used for comparative purposes** |  |

**Section 2: Overview of the tender evaluation process**

* 1. **General**

Tenders were invited and evaluated strictly in accordance with the requirements of the SANS 10845-3, *Construction procurement – Part 3: Standard Conditions of Tender*, and the Tender Data contained in the procurement documents.

The intended outcome for this tender procedure is to      [[4]](#footnote-4)

* 1. **Scope of work**

The scope of work associated with the contract is as follows:[[5]](#footnote-5)

|  |
| --- |
|  |

**2.3 Eligibility Criteria**

The stated eligibility criteria were as follows:[[6]](#footnote-6)

|  |
| --- |
|  |

**2.4 Evaluation criteria**

**2.4.1 Evaluation Method**

 The tender evaluation method was:[[7]](#footnote-7)

|  |
| --- |
|   |

**2.4.2 Reducing the financial offer to a comparative offer**

The financial offer was reduced to a comparative offer by means of a Tender Assessment Schedule. The Tender Assessment Schedule used for this tender was as follows:[[8]](#footnote-8)

|  |
| --- |
|   |

**2.4.2 Preferences**

The preferences provided for in the Preferencing Schedule was as follows:[[9]](#footnote-9)

**2.4.3 Quality criteria**

 The quality criteria and maximum score in respect of each of the criteria are as follows:[[10]](#footnote-10)

|  |
| --- |
|   |

 The quality criteria in outline were as follows:[[11]](#footnote-11)

The prompts for judgement and the score associated with each prompt for judgement are as follows:[[12]](#footnote-12)

|  |
| --- |
|  |

* 1. **List of Returnable Documents**

The List of Returnable Documents was as follows:[[13]](#footnote-13)

|  |
| --- |
|  |

**2.6 Additional conditions of tender**

The following additional conditions of tender to those contained in SANS 10845-3 were included in the Tender Data: **[[14]](#footnote-14)**

|  |
| --- |
|  |

**2.7 Addenda issued**

There were no Addenda issued for this tender.[[15]](#footnote-15)

**2.6 Conflicts of interest**

The members of the Evaluation Committee and the registered professional compiling this report have declared that they have no conflict of interest.[[16]](#footnote-16)

**Section 3: Tender evaluation process**

* 1. **Tender offers received**

Tender offers were received from the following tenderers:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tenderer No** | **Name of Tenderer** |  | **Number of copies submitted** | **Attendance at compulsory clarification (yes / no)** |
|  |  |  |  |  |
|  |  |  |  |  |

There were no late submissions received / The following late submissions were received and were returned unopened to the tenderer: [[17]](#footnote-17)

|  |  |
| --- | --- |
| **Tenderer No** | **Name of tenderer** |
|  |  |
|  |  |

* 1. **Completeness of tender submissions**

The completeness of the tender submissions received were as follows:[[18]](#footnote-18)

|  |  |
| --- | --- |
| **Returnable document[[19]](#footnote-19)** | **Comments on returnable documents** |
| **Tenderer no** |
| **1** | **2** | **3** | **4** | **5** | **6** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

The following clarifications were requested and received in terms of clauses 4.17, 4.18 and 5.10 of SANS 10845-3.

|  |  |  |
| --- | --- | --- |
| **Tenderer No** | **Clarification Sought** | **Clarification received** |
|  |  |  |
|  |  |  |

* 1. **Responsiveness of tenderers**

The tenderers were assessed for compliance with the eligibility criteria. The following tenderers were found not to be eligible for evaluation and therefore eliminated from any further consideration / All tenderers were found to have satisfied the eligibility criteria:[[20]](#footnote-20)

| **Tenderer No** | **Eligibility criterion not complied with** | **Reason for declaring tenderer not eligible** |
| --- | --- | --- |
|  |  |  |
|  |  |  |

The remaining tender offers were tested for responsiveness in accordance with the provisions of clause 5.8 of SANS 10845-3. The following tenderers were found to have submitted non-responsive submissions and are therefore rejected / No tenderers were found to have submitted non-responsive tenders :[[21]](#footnote-21)

| **Tenderer No** | **Reason for declaring tenderer non-responsive** | **Reference in procurement documentation or SANS 10845-3 relating to tender offer being declared as non- responsive** |
| --- | --- | --- |
|  |  |  |
|  |  |  |

* 1. **Evaluation of tender offers**

**3.4.1 Points for quality[[22]](#footnote-22)**

.

 The points for quality were as follows:[[23]](#footnote-23)

|  |  |  |  |
| --- | --- | --- | --- |
| **Tenderer** **No**  | **Evaluator** | **Evaluation criteria**  |  **Combined quality Score (NQ)**C1ave x n1 + C2 ave x n2 + C3ave x n3 |
| **Criterion 1 (C1)** (specify)  | **Criterion 2 (C2)** (specify) | **Criterion 3 (C3)** (specify) |
| **Weighting** |
| **n1** | **n2** | **n3** |
|  | No 1 |  |  |  |  |
| No 2 |  |  |  |
| No 3 |  |  |  |
| Average score per criterion  |  |  |  |
|  | No 1 |  |  |  |  |
| No 2 |  |  |  |
| No 3 |  |  |  |
| Average score per criterion |  |  |  |

 The names and qualifications of the evaluators were as follows:

|  |  |  |
| --- | --- | --- |
| **Name**  | **Category of registration (PrArch, PrSArchT, PrEng, PrTechEng, PrLArch, PrLTechno, PrCPM, PrCM or PrQs)**  | **Registration no** |
|  |  |  |
|  |  |  |
|  |  |  |

The minimum number of tender evaluation points for quality was established in the Tender Data was       points. The following tenderers failed to achieve the minimum tender evaluation points for quality are therefore not considered in the evaluation of the financial offer and preferences:

|  |  |  |
| --- | --- | --- |
| **Tenderer no** | **Name of tenderer** | **Quality points (NQ)** |
|  |  |  |

**3.4.2 Points for financial offer**

The financial offer is reduced to a comparative offer using the formulae included in the Tender Assessment Schedule and points are allocated as follows:[[24]](#footnote-24)

|  |  |  |  |
| --- | --- | --- | --- |
| **Tenderer No** | **Tendered parameters used to determine the comparative offer using the formulae included in the tender assessment schedule** | **Comparative offer** | **Points for financial offer (NFO)** |
| **(Specify)** | **(Specify)** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**3.4.3 Points for preferences**

The points for preferences resulted in the following:[[25]](#footnote-25)

|  |  |  |  |
| --- | --- | --- | --- |
| **Tenderer No** | **B-BBEE level contributor** | **Number of preference points awarded for a specific goal** | **Total number of preference points (NP)** |
|  |  | **B-BBEE** | **Other (specify)** |
|  |  |  |  |  |
|  |  |  |  |  |

**3.4.4 Combined tender evaluation points[[26]](#footnote-26)**

The combined Summary of Tender Evaluation Points awarded is as follows:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Tenderer Number** | **Financial Score** | **Preference Score** |  **Quality Score\*** | **Combined Tender Evaluation Points (TEV)** | **Ranking** |
| **(NFO)** | **(NP)** | **(NQ)** |
| Weighting (f1) ( (NFO + NP) = \* | Weighting (f2) for NQ = \* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

\* Delete weightings and column for quality score if method 3 (financial offer and preference) is used

 From the evaluation, it was determined that highest scoring offer came from:

* 1. **Reasons for disqualification on the grounds of corrupt or fraudulent practice**

 There were no tenderers that needed to be considered for disqualification on the grounds of corrupt or fraudulent practice. / The following tenderers are disqualified on the grounds of corrupt or fraudulent processes for the following reasons:[[27]](#footnote-27)

* 1. **Compliance with legal requirements**

 The legal requirements stated in the clause 5.13 of the Tender Data were as follows:

|  |
| --- |
|   |

All tenderers satisfied the legal requirements / The following respondents who remain in contention fail to comply with the following legal requirements and, as a result, are eliminated:[[28]](#footnote-28)

**3.7 Acceptability of the preferred tenderer**

The risks associated with appointing the preferred tenderers as set out in clause 5.13 of the Tender Data are deemed to be acceptable for the following reasons:[[29]](#footnote-29)

**Section 4: Recommendation**

 The following tenderer is recommended for the award of the contract:

 This evaluation report was prepared by:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  **Name**  | **Category of registration (PrArch, PrSArchT, PrEng, PrTechEng, PrLArch, PrLTechno, PrCPM, PrCM or PrQs)**  | **Registration no** | **Signature** | **Date** |
|  |  |  |  |  |

**Section 5: Confirmation of recommendations**

 The recommendations are confirmed. / The recommendations are confirmed subject to the following amendments being effected:[[30]](#footnote-30)

      .

|  |  |  |  |
| --- | --- | --- | --- |
| **Name**  | **Designation** | **Signature** | **Date** |
|  | Chairperson of the Evaluation committee |  |  |

The members of the Evaluation Committee were as follows:

|  |  |
| --- | --- |
| **Name**  | **Designation** |
|  |  |
|  |  |
|  |  |

1. Include information as relevant. Delete lines in summary if not applicable [↑](#footnote-ref-1)
2. Include only if a framework agreement. Value is indicative to give a sense of the likely value [↑](#footnote-ref-2)
3. Provide only if a price is tendered. This is usually a professional estimate [↑](#footnote-ref-3)
4. Describe the intended outcome preferably using the words contained in the procurement documents. Reproduce text used in the procurement document in a box, where appropriate. [↑](#footnote-ref-4)
5. Briefly outline scope so that the reader has an idea as to what is covered by the contract or framework agreement. Put it in a box if it is copied directly from the procurement documents [↑](#footnote-ref-5)
6. Reproduce in the box the eligibility criteria stated in 4.1 of T1.2 Tender Data. [↑](#footnote-ref-6)
7. State tender evaluation method number as indicated in 5.11 of SANS 10845-3 and reproduce the tender data associated the evaluation of the selected method in 5.11 of T1.2 Tender Data [↑](#footnote-ref-7)
8. Delete if not applicable or state the manner in which financial offers were reduced to a comparative offer or reproduce the essence of Tender Assessment Schedule contained in the procurement documents in the box [↑](#footnote-ref-8)
9. Describe specific goals and indicate the points allocated to such goal or the manner in which the points are calculated [↑](#footnote-ref-9)
10. Insert into the box the tender data for quality associated with the quality criteria in 5.11.9 of T1.2 Tender Data [↑](#footnote-ref-10)
11. Provide an outline of each of the quality criteria that are evaluated. [↑](#footnote-ref-11)
12. Reproduce in the box the prompts for judgement contained in the procurement document, if any. [↑](#footnote-ref-12)
13. Reproduce in the box the contents of T.2.1 List of returnable documents [↑](#footnote-ref-13)
14. Reproduce additional conditions for the calling for an expression of interest in the box or replace text with “There are no additional conditions for the calling for an expression of interest [↑](#footnote-ref-14)
15. If addenda were issued, modify statement and indicate the nature of the addenda that were issued [↑](#footnote-ref-15)
16. Amend as necessary and record any declared potential conflicts of interest and the resolution of such declared interest by the committee [↑](#footnote-ref-16)
17. Delete text which is not applicable. [↑](#footnote-ref-17)
18. Duplicate table as necessary or put into landscape, depending upon the number of submissions received [↑](#footnote-ref-18)
19. Link returnable documents to the contents of T.2.1 List of returnable documents [↑](#footnote-ref-19)
20. Modify as necessary [↑](#footnote-ref-20)
21. Modify as necessary [↑](#footnote-ref-21)
22. Delete if not applicable. Modify as necessary [↑](#footnote-ref-22)
23. Alternatively only provide the average scores and include the individual scores in an appendix. [↑](#footnote-ref-23)
24. Amend as necessary [↑](#footnote-ref-24)
25. Amend as necessary [↑](#footnote-ref-25)
26. Amend as necessary if quality is not included in the tender evaluation points [↑](#footnote-ref-26)
27. Amend as necessary [↑](#footnote-ref-27)
28. Amend as necessary [↑](#footnote-ref-28)
29. Amend as necessary. Frame them around, as necessary and in relation to the proposed contract, the demonstration of the possession of the professional and technical qualifications, professional and technical competence, financial resources, equipment and other physical facilities, managerial capability, reliability, experience and reputation, expertise and personnel, to perform the contract. Alternatively cite reasons for overlooking such tenderer, notwithstanding any eligibility criteria [↑](#footnote-ref-29)
30. Amend as necessary [↑](#footnote-ref-30)