

	EVALUATION REPORT FOR THE TA CONSULTANCY COOPERATION AGREEMENT	PUBLICATION DATE: 09/11/2023 INTERNAL REFERENCE: EDFIMC-SP-23-05-TA RESPONSIBLE FOR THE PROCEDURE: Luc COOL
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EVALUATION REPORT TEMPLATE

[The EDFI MC Evaluation committee shall select and evaluate the participants in this tender process in accordance with the criteria as published in the tender documentation. The EDFI MC Evaluation committee conclusions shall be documented substantially in accordance with the below template].

Report completed by _____ Date: __/__/2__

Calendar

	Date	Hour
Publication of the Contract Notice (Phase 1)		
Candidature Form submission deadline		
Publication of the Tenders Specifications (Phase 2)		N / A
Submission Form submission deadline		

Assessment

A total of <XXX> submissions were received. Each of them has been assigned a sequential number. This number has been included on all copies of the submission and will be retained throughout the evaluation process as a unique reference. The complete list of submissions received is presented in the appendix.

CANDIDATURE STAGE (PHASE 1)

Attendees of the evaluation committee

Name	Representing	Role ¹

1.1 IDENTIFICATION DATA

Name of Candidate	
Reference number :	
Country and date of registration	

Name of Candidate	
Reference number :	
Country and date of registration	

Name of Candidate	
Reference number :	
Country and date of registration	

Name of Candidate	
Reference number :	
Country and date of registration	

One table should be included and completed for each candidate.

¹ Evaluator, president, secretary, ...

1.2 SHORTLIST REPORT

The evaluation committee identified all requests to participate which were submitted before the deadline. All members of the evaluation committee and any observers signed declarations of impartiality and confidentiality.

The evaluation committee then applied the following selection criteria to these requests to participate, as specified in the contract notice:

Economic and financial standing: for the contract covered by this call for tenders, EDFI MC requires tenderers (for avoidance of doubt the elements above apply to each member of the consortium but do not apply to subcontractors) to have a minimum financial and economic capacity which will be assessed on the basis of the following elements:

- an average annual turnover equal to or greater than 1.000.000 euros, over the last three financial years, and
- current ratio (current assets/current liabilities) in the last year for which accounts have been closed must be at least 1. In case of a consortium this criterion must be fulfilled by each member.

Professional capacity: EDFI MC requires tenderers to demonstrate a minimum level of capacity consisting of sufficient human and technical resources to carry out the TA Services:

- at least 12 staff currently work for the candidate in fields related to this contract, and
- out of these 12 staff, minimum 5 should be permanently employed.

Technical capacity: The tenderer has obtained good results, during the last three years, for at least two projects with a budget not less than EUR 1 000 000 each, in fields and geographies related to this contract. These projects should demonstrate the tenderer's:

- experience in designing and managing technical assistance programmes in the sphere of agriculture and agri-business, and/or
- experience working with smallholder farmers and related organisations, and/or
- experience working in developing countries, in particular in Sub-Saharan Africa and/or South East Asia, and/or
- access to a network of experienced experts including national and regional expertise in the countries of interest for AgriFI, and/or
- experience working with or reporting to international donors, development finance institutions and/or the European Commission.

Fluency in English is required as the main operational language, other languages are a plus.

The results of this examination and the name of candidates who were rejected because they did not meet the selection criteria or did not comply with the requirements for submission are shown in the attached long list.

[If clarifications were requested for the requests to participate from any candidates:

With the agreement of the other evaluation committee members, the EDFI MC wrote to the following candidates whose requests to participate required clarification, offering

them the possibility to respond by e-mail within a reasonable time-limit fixed by the evaluation committee (all correspondence is attached in the annex indicated) The table also shows the name of candidates who are proposed to be rejected following the exchange of correspondence:

Request to participate number	Name of candidate	Annex number of exchange of correspondence	Reason for rejection (if applicable)
			[The candidate is in an exclusion situation]
			[The candidate has misrepresented or failed to supply the information required as a condition for participation]
			[The candidate was previously involved in the preparation of procurement documents, this entailing a distortion of competition which cannot be remedied otherwise.]
			[other reason, if any]

[If the number of suitable requests to participate meeting the selection criteria is less than 4:

There were less than four suitable requests to participate which satisfied all the selection criteria. EDFI MC has verified that all of the following issues were satisfactory:

- Sufficient time has been given for the publication.
- The scope of service is in line with the budget.
- The selection criteria used were clear and non-discriminatory and not beyond the scope of the contract.]

[If the number of suitable requests to participate meeting the selection criteria is more than 8:

There were more than eight suitable requests to participate which satisfied all the selection criteria. Consequently, the relative strengths and weaknesses of these candidates were re-examined using the additional selection criteria published in the additional information about the contract notice (the highest number or projects that meet the selection criterion Technical Capacity of the Candidate, to identify the eight best requests to participate for the tender procedure. The following candidates were not short-listed as a result of this re-examination:

Request to participate number	Name of candidate	Reason for not being proposed to be included in the final shortlist

This resulted in a final shortlist of < number > candidates.]

The evaluation committee has ensured that there is no detection of the proposed short-listed candidates (i.e. leaders + members in their consortia and subcontractors, if any) in the EU sanction map.

We therefore recommend using the draft short-list notice in annex for publication of the list of selected candidates.

1.3 CONCLUSION

Short-listed candidates:

Request to participate number	Name of short-listed candidate	Reason for being included in the final shortlist	Contact details

1.4 SIGNATURES OF THE EVALUATION COMMITTEE

	Name	Signature
Chairperson		
Secretary		
Evaluators		

Approved by the EDFI MC as the contracting authority:

Name and signature:

Date:

Name:

Title:

Signature:

Date:]

EVALUATION STAGE (PHASE 2)

Attendees of the evaluation committee

Name	Representing	Role ²

² Evaluator, president, secretary, ...

2.1 ADMINISTRATIVE EVALUATION GRID

Date and time opening the administrative files: [XXX]

Tender number	Name of the Tenderer	Submission form duly completed?	Submission declaration signed (if applicable, by each member of the consortium)?	Financial identification form submitted?	Legal entity form submitted?	Proof of authorized signature submitted?	Tender comments on the Specifications included (Technical Proposal Part A) ?	Organization & methodology included (Technical Proposal Part B)?	Main expert CV submitted?	Project references submitted?	Statements of exclusivity submitted for all key experts?	Bid language as required?	Is subcontracting acceptable? (Yes/No/Not Applicable)	Is the nationality of the subcontractors eligible? (Yes No)	Overall decision? (Accepted / Rejected)
1															
2															
3															
4															
5															
6															
7															
8															

2.2 TECHNICAL EVALUATION GRID

Date and time opening the technical proposals: [XXX]

	Award criteria	Maximum points	[Tenderer 1] points	[Tenderer 2] points	[Tenderer 3] points	[Tenderer 4] points	[Tenderer 5] points	[Tenderer 6] points	[Tenderer 7] points	[Tenderer 8] points
1	Comments to the ToR	20								
2	Key Experts Team	30								
3	Local network	30								
	Total	80								

In the above table, the marks obtained by averaging the marks given by the various evaluators should be mentioned. The table must include as many columns as there are bidders, specifying in each column the reference number allocated. Attached to this document is the same table which was completed by each evaluator and which was used to calculate the averages. Each evaluator must complete a copy of this table and date and sign it.

The evaluation committee must evaluate the offers on the basis of this evaluation grid, which contains maximum marks. These maximum scores cannot be modified after the deadline set for the communication of any clarifications to potential tenderers.

TECHNICAL EVALUATION SCORING METHODOLOGY

A Maximum of 80 points can be scored for the technical assessment, as detailed in the table below. Only tenders with an average score of at least 50 points will be subject to a financial evaluation.

Technical assessment	
Award criteria	Max no. of points that can be obtained
Comments to the Terms of Reference	10
If any, relevance of any critique / recommendations on the project scope;	5
Relevance of the detailed organisation and methodology proposal	5
Key Experts Team	40
Relevant experience working in the agri-sector, with smallholder farmers, farmer organisations, rural SMEs; proven expertise overcoming key barriers including those related to general agricultural practices, environmental, social and governance (ESG) barriers;	10
Relevant experience designing and managing TA; in support of impact and commercial investors;	10
Relevant experience in Sub-Saharan Africa and / or South-East Asia;	10
Diversity and relevance of languages spoken by staff (English, French, etc);	5
Clarity on roles and governance of the Key Expert Team and experience of working together, including programme management arrangements with sub-contractors and/or key stakeholders if any.	5
Local network	30
Representation and quality of networks of local or regional expertise in countries where EDFI MC AgriFI has or may invest;	15
Proven approach to identify and contract local expertise and involve local persons or firms in delivering technical assistance, including a transparent and rigorous approach to contracting services from third parties.	15

The evaluation committee has evaluated the quality of the technical proposals in accordance with the scale detailed in the table below.

Quality of the response	Percentage of maximum points available
Excellent, with added value. Tenderer's answer is above expectation. According to the evaluation committee, the Tenderer gave a relevant, applicable, and excellent answer that is entirely based on the principles of this tender, the objective of this assignment, the required service, EDFI MC, and the Cooperation Agreement. All elements and aspects of the question and answers thereto are fully addressed.	100%

Good. According to the evaluation committee, the tenderer gave a relevant, applicable and good answer that is based on the principles of this tender, the objective of this assignment, the required service, EDFI MC, and the Cooperation Agreement. All elements and aspects of significant points of the question and answers thereto are addressed clearly.	80%
Partially satisfactory. According to the evaluation committee, the tenderer gave a partly relevant, applicable answer that is based on the principles of this tender, the objective of this assignment, the required service, EDFI MC, and the Cooperation Agreement. All elements and aspects of the questions and answers thereto are partly, or briefly addressed.	60%
Not satisfactory. According to the evaluation committee, the tenderer gave an insufficient answer that is not or not adequately based on the principles of this tender, the objective of this assignment, the required service, EDFI MC, and the Cooperation Agreement. Not all elements and aspects of the questions and answers thereto have been adequately and/or sufficiently discussed.	40%
Poor, not satisfactory at all. According to the evaluation committee, the tenderer gave very inadequate answer that by no means is based on the principles of this tender, the objective of this assignment, the required service, EDFI MC, and the Cooperation Agreement. None of the elements and aspects of the question and answers thereto have been discussed.	20%
No information.	0%

CONCLUSION OF THE TECHNICAL EVALUATION

The evaluators discussed their observations and the marks given to the technical offers. The main strengths and weaknesses mutually agreed by the evaluators for each offer are as follows:

Tender number	Name of the Tenderer	Strengths	Weaknesses

2.3 FINANCIAL EVALUATION GRID

Date and time opening the financial proposals: [XXX]

The evaluation committee checked that the financial offers complied with the formal conditions of the tender dossier.

The following financial offers did not meet the formal requirements (and were rejected for this reason, as indicated):

Tender number	Name of the Tenderer	Condition(s) of form not respected	Offer rejected? (YES NO)

The evaluation committee compared the financial proposals indicated in the remaining financial offers in order to determine their respective financial score:

Tender number	Name of the Tenderer	Financial assessment score	Note

[If an offer seems to present an abnormally low price compared to the services in question : The tender submitted by < name of tenderer > seemed to present an abnormally low price in relation to the market for the services in question. Accordingly, the Chairman of the Evaluation Committee addressed a letter to < name of bidder > seeking a detailed explanation of the low price offered.

Based on the bidder's response, the evaluation committee decided:

[to accept the bid [because the bidder used an economical method of production] [because of the nature of the technical solution used] [because the financial bid reflected the exceptionally advantageous terms enjoyed by the bidder.]]

OR [to reject the offer, the abnormally low price not having been justified by objective elements.]

FINANCIAL EVALUATION SCORING METHODOLOGY

Award criteria	Max no. of points that can be obtained
Fee structure	
Proposed cost structure	20

As part of the financial assessment, the tenderers were requested to provide the maximum fee rates chargeable for each job family of the Key Expert Team and also external network experts and/or any third party experts. Fee rates must be quoted in EUR, on a fully costed basis (i.e. including all management time, other overheads and profit) but excluding VAT and direct costs attributable to the TA assignment (ex. travel and accommodation cost, etc). The Fee rates are be subject to price revision as indicated in the published specifications.

The financial assessment will apply the following mathematical formula to calculate the scores for each tenderer. (Note: scores will be rounded to 1 decimal place).

$$\left[\frac{\text{Lowest Programme Team Job Family Rate}}{\text{Your Programme Team Job Family Rate}} \times \text{Max Score} \right] \times \text{Weighting \%}$$

The 'Lowest Program Team Job Family Rate' will be the lowest rate proposed for that specific job family, from among all qualifying tenderers. This will be divided by the rate proposed for this job family in the tender under consideration. This value will then be multiplied by the maximum score available the financial assessment. This value is then multiplied by the sub-weighting percentage for that band.

The Expert Job Families and sub-weightings applied to this criterion are as follows:

Expert Job Family	Weighting
Principal Expert	35%
Senior Expert	25%
Expert	25%
Assistant Expert	15%

2.4 SUPPORTING DOCUMENTS

Verification of supporting documents relating to the exclusion and selection criteria

The president of the evaluation committee has ensured that any supporting documents relating to the exclusion and selection criteria have indeed been submitted for the tender obtaining the highest overall score.

[If clarifications regarding supporting documents have been requested from the tenderer:

With the agreement of the other members of the evaluation committee, the president sent an email to the tenderers offering them the possibility of replying within a reasonable time limit set by the evaluation committee (all of this correspondence is attached in the appendix indicated):

Tender number	Name of the Tenderer	Summary of correspondence exchanged

The evaluation committee checked the supporting documents relating to the exclusion and selection criteria provided for the offer with the highest overall score, and the documents were found to be [admissible] [inadmissible].

If the supporting documents are not deemed admissible, the evaluation committee goes to the technically and financially acceptable offer having obtained the second highest score and verifies the relevant supporting documents. If the documents are found to be admissible, the resulting conclusion may be to offer to award the contract to the tenderer concerned.

The evaluation committee has ensured that no recommended bidder or member of its consortium is listed in the rapid detection and exclusion system.

Consequently, the evaluation committee recommends that the contract for an amount of < amount > [EUR]

2.5 SIGNATURES OF THE EVALUATION COMMITTEE

	Name	Signature
President		
Secretary		
Appraisers		

Approved by the EDFI MC as the contracting authority:

Name and signature:

Date:

Name:

Title:

Signature:

Date:]