***[Application Evaluation Report for the Procurement of Consulting Services – Standard Template –***

*Notes on this document*

***0. INTRODUCTION***

*This template has been prepared by KfW to support Project Executing Agencies (PEA) and Tender Agents (TA) when preparing Financial Evaluation Reports during Project Implementation. This template is applicable to the selection of Consultancy Services. The structure and the content of the evaluation template has been prepared in such a way that it contains all relevant information regarding the chronological order as well as the establishment of the evaluation results. Tender Agents engaged under an Agency Contract between the PEA and KfW are required to use this template. PEAs are encouraged to make use of it in different set-ups as well.*

*For the selection of Consultants KfW provides Standard Bidding Documents (SBD). The terms used in the following are based on these standard documents. In this context the term Consultant and Engineer may be used interchangeably, the same applies for the term PEA and Employer.*

*This template should be adapted in conformity with the respective project conditions, unneeded paragraph sections or tasks may be dropped depending on the specific context of the assignment under consideration of the requirements outlined in KfW's SBDs. Care should be taken to place the signatures of the evaluation committee on the same page as the evaluation result.*

*The italicised texts in square brackets, as shown within this complete chapter, are notes to the PEA/TA providing guidance when preparing the Evaluation Report. Such notes shall be deleted from the final Evaluation Report document.*

**German Financial Cooperation with [*insert name of country*]**

**Project: [*insert name of project*]**

**Application Evaluation Report**

**for**

**Consulting Services for *[insert title of services*]**

**Employer: *[insert name and address of Employer]***

***[in case of an agency contract add: Represented by KfW]***

*[insert month, year]*

Project number: *[insert project number]*

Procurement number*: [insert procurement number]*

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#### General

*[Insert text / tick boxes / delete if not relevant / add explications or comments if required]*

Short Project description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tender Procedure applied:

|  |  |  |  |
| --- | --- | --- | --- |
| International Competitive Bidding ICB |  | National Competitive Bidding NCB |  |
| Limited Competitive Bidding LCB |  |  |  |
| Single stage selection |  | Two stage selection |  |
| One envelope submission |  | Two envelope submission |  |

Underlying “Guidelines for the Procurement of Consulting Services, Works, Plants, Goods and Non-Consulting Services in Financial Cooperation with Partner Countries” for the selection procedure used in version: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| Approval / No objection dates to … | PEA approval | KfW No object. |
| - PQ document & publication notice (Annexe 1A/1B) |  |  |
| - Detailed Evaluation Matrix (Annex 2A/2B) |  |  |

*In case of agency contract replace above table by the table below*

|  |  |  |
| --- | --- | --- |
| Approval dates under agency contract to … |  | KfW approval |
| - PQ document & publication notice (Annexe 1A/1B) |  |  |
| - Detailed Evaluation Matrix (Annex 2A/2B) |  |  |

|  |  |  |
| --- | --- | --- |
| Publication date in | GTAI (Annexe 3A) |  |
| Publication date in | *[fill in in case of additional publication]* (Annexe 3A) |  |
| Submission deadline as per publication | |  |
| Number of potential Applicants requesting PQ document | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| *If relevant complete below table* | published on … | no. of days | extended submission date |
| Submission deadline extension (Annexe 3B) |  |  |  |

|  |  |  |
| --- | --- | --- |
| *If relevant complete table below* | date … | place/address |
| Information meeting (details Annexe 4) |  |  |

*If relevant provide data for clarification requests and/or addenda*

|  |  |
| --- | --- |
| Number of Clarification requests received & answered (Annexe 5) |  |
| Number of Addenda to PQ document issued (details Annexe 6) |  |
| Number of Applications received (details Annexe 7) |  |
| Number of Applications uploaded to platform (details Annexe 7) |  |

**Table 1 - List of Applications Submitted**

| **No**. | **Name of Applicant** | **Name of Lead firm** | **Name(s) of JV Partner(s)** | **Name of sub-consultant(s)\*** | **Submission date and time** | **Compliance with packaging requirements** | **Pass/Fail**  Pass if submission was before submission date (initial or extended, see previous page)and compliant with packaging requirements. |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | *[Insert company name or in case of joint venture insert name of JV]* | *[in case of JV insert name of lead firm]* | *[in case of JV insert name(s) of JV partner(s)]* | *[insert name(s) of sub-consultant(s)]* | *[insert date and time of submission]* | *[insert “yes” or “no”]* | *[insert “Pass” or “Fail”, if Fail, insert reason]* |
| 2 | *[Insert company name or in case of joint venture insert name of JV]* | *[in case of JV insert name of lead firm]* | *[in case of JV insert name(s) of JV partner(s)]* | *[insert name(s) of sub-consultant(s)]* | *[insert date and time of submission]* | *[insert “yes” or “no”]* | *[insert “Pass” or “Fail”, if Fail, insert reason]* |
| *Etc.* |  |  |  |  |  |  |  |

*\* only if Applicant requests sub-consultant(s) to be considered for qualification*

#### Criteria for Evaluation

As per 4.2.4 b) of the General Provisions (GP) of the SPQ the minimum score to be qualified is 70 out of 100 points, while as per GP 4.2.5 the number of prequalified Applicants invited to submit a Proposal is limited to the first *[insert number]* Applicants that achieve or exceed the minimum score.

The evaluation of the Applications is limited strictly to the content and the matters of the documents submitted. The following two tables have been published in the PQ document and provide the basis for the assessment of i) the responsiveness (table 2) and ii) the qualification of the Applicants (table 3).

*[in case of modifications of the published evaluation criteria as a result of clarifications and / or addenda explain modifications introduced]*

**Table 2 – Responsiveness Assessment Template**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Type of Document required as per GP 2.2.1  *[Delete any of the following requirements in case of deviations to standard PQ requirements]* | | | | | | Required  (yes/no) | | Pass/Fail  (yes/no) |
| 1. Application letter | | | | | | yes | | no |
| 1. Power of Attorney | | | | | | yes, if applicable | | yes, if applicable |
| 1. Presentation of the Applicant | | | | | | yes | | no |
| 1. Declaration of Undertaking | | | | | | yes | | yes |
| 1. Declaration on Conflict of Interest and of Submitting a proposal | | | | | | yes | | yes |
| 1. Joint Venture agreement or Declaration of association | | | | | | yes, if applicable | | yes, if applicable |
| 1. Compliance with minimum financial requirements as per table below | | | | | | yes | | yes |
| Criterion | Requirement | Single entity | Joint venture | | | | | Submission Requirements |
| All parties combined | Each party | | | One party |
| Turnover annually | Minimum turn-over *[insert amount]* EUR for the last 3 years | Must meet requirement | Must meet requirement | *[insert requirement, if any]* | | | *[insert requirement if any]* | GP 2.2.1 d) v / Annexe 4 |
| Current ratio | Minimum current ratio *[insert number]* | Must meet requirement |  | Must meet requirement | | |  | GP 2.2.1 d) v / Annexe 4 |
| 1. 2.1.1(d)(VI) *[insert number of]* Project References over the last *[insert number of]* years (starting not earlier than *[insert year]*). | | | | | yes | | | no |
| 1. List of available Expertise and Human Resource Capacity | | | | | yes | | | no |
| 1. 2.1.1(e) Additional Documents: *[insert list of documents if required:]* | | | | | yes | | | *[insert* “yes” or “no” *as the case may be]* |

The evaluation of the responsiveness focused on items a) to g) and j) of above table out of which criteria b), d) to g) and j) were evaluated on a pass/fail basis.

Substantially responsive Applications as per above table were subsequently evaluated in accordance with the qualitative approach as per GP 4.2.3. and the following criteria and scoring system.

**Table 3 – Qualification Assessment Template**

|  |  |
| --- | --- |
| **Qualification criteria** | **Scoring** |
| **1. Applicant’s Experience** | *[insert scoring as per PQ]* |
| * 1. Experience in implementing similar projects   *[insert criteria as per PQ]*  This sub-criterion is evaluated based on the project references submitted in accordance with GP 2.2.1(d) (VI). | *[insert scoring as per PQ]* |
| * 1. Experience with working-conditions in developing and/or transition countries.   This sub-criterion is evaluated based on the project references submitted in accordance with GP 2.2.1(d) (VI). | *[insert scoring as per PQ]* |
| * 1. Experience with working-conditions in *[insert region or list of countries as per PQ]*.   This sub-criterion is evaluated based on the project references submitted in accordance with GP 2.2.1(d) (VI). | *[insert scoring as per PQ]* |
| **2. Applicant’s Capabilities** | *[insert scoring as per PQ]* |
| 2.1 Qualitative assessment of the Applicant’s available Expertise  The quality of the expertise appropriate for the project team profiles described in GP 1.6 of the PQ, to which the Applicant has access. This sub-criterion is evaluated based on the list submitted in accordance with GP 2.2.1(d) (VII). | *[insert scoring as per PQ]* |
| 2.2 Quantitative assessment of the Applicant’s Human Resource Capacity  The extent to which the Applicant has access to personnel appropriate for the tasks described in GP 1.6 of the PQ. This sub-criterion is evaluated on the basis of the List submitted in accordance with GP 2.2.1(d) (VII). | *[insert scoring as per PQ]* |
| **3. Is the Application concise and related to the project?** | *[insert scoring as per PQ]* |
| **Overall Total Score** | **100** |

*[in case individual clarifications with Applicants during the evaluation took place insert:* “During evaluation individual clarifications with the following Applicants were necessary *[list names of Applicants]*. These clarifications are documented in Annexe 8 and elaborated further on throughout chapter 3*”]*.

The main criteria as per above table were subdivided into sub-indicators presented in the detailed evaluation matrix in Annexe 10 to achieve a detailed, objective, and transparent assessment of the submitted and substantially responsive Applications.

The Applications were evaluated by a Tender Committee whose composition is presented in Annexe 9.

*[Or in case of an agency contract insert:]* The Applications were evaluated by the Tender Agent on behalf of the Employer.

#### Results of the Evaluation

The following chapters provide short descriptions of the results of the evaluation using the criteria listed in table 2 and 3 above. The aspects mentioned for each of the Applicants are the most prominent ones. A comprehensive evaluation is presented in the evaluation matrix (Annexe 10).

#### Evaluation of Responsiveness of the Applications

The following table provides an overview of the responsiveness of the Applications as per GP/SP 2.2 and 4.2 of the Prequalification document.

**Table 4 – Summary of Responsiveness of the Applications**

| No. | Name of Applicant | Power  of Attorney  (GP 2.2.1.b) | Declaration of Undertaking  (GP 2.2.1.d) | Declaration on conflict of interest  (GP 2.2.1.d) | JV Agreement or Declaration of Association (GP 2.2.1.d) | Financial  capacity  (GP 2.2.1.d  SP 4.2.1.) | Additional documents  (GP 2.2.1.e,  SP 4.2.1) | Substantial Responsive |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Pass/Fail,  If applicable | Pass/Fail | Pass/Fail | Pass/Fail,  if applicable | Pass/Fail | Pass/Fail  If applicable | Yes/No |
| *1.* | *[insert name]* | *[insert “applicable” or “not applicable”; insert “Pass” or “Fail”, if applicable]* | *[insert “Pass” or “Fail”]* | *insert “Pass” or “Fail”]* | *[insert “applicable” or “not applicable”; insert “Pass” or “Fail”, if applicable]* | *insert “Pass” or “Fail”]* | *[insert “applicable” or “not applicable”; insert “Pass” or “Fail”, if applicable]* | *[insert “Yes” or “No” and main reason for NO]* |
| *2.* | *[insert name]* | *[insert “applicable” or “not applicable”; insert “Pass” or “Fail”, if applicable]* | *[insert “Pass” or “Fail”]* | *insert “Pass” or “Fail”]* | *[insert “applicable” or “not applicable”; insert “Pass” or “Fail”, if applicable]* | *insert “Pass” or “Fail”]* | *[insert “applicable” or “not applicable”; insert “Pass” or “Fail”, if applicable]* | *[insert “Yes” or “No” and main reason for NO]* |
| *Etc.* |  |  |  |  |  |  |  |  |

#### Assessment of Responsiveness of *[insert name of Applicant]*

*[Provide details only for those Applications which has either been determined as non-responsive as per table 4 or for which individual clarification(s) were necessary in order to establish substantial responsiveness. For each such Application insert a separate sub-chapter with a summary of deviations and / or clarifications and the overall responsiveness as proposed below.*

The Application has the following deviations:

* *[enlist each deviation and assess whether the Application is still compliant*
* *enlist individual clarifications, if any and if they could be solved within the given deadline(s);*

In conclusion, the deviations have been found as not material and/or could be solved by way of clarification so that the Application can be considered as **substantially responsive** with the requirements contained in table 2 above.

*Or if negative, insert:*

In conclusion, the deviations have been found as material and/or could not be solved by way of clarification so that the overall Application is **not substantially responsive** with the requirements contained in table 2 above*.]*

#### Qualitative Evaluation of Applications

The following table summarizes the findings of the qualitative evaluation of Applications regarding GP 2.2.1 and SC 4.2.3.

**Table 5 – Summary of Qualitative Evaluation of Applications**

| **No.** | **Applicant** | **1. Evidence of relevant experience gained by the Applicant** | | | **2. Applicant’s Capabilities** | | | **3. Form of the Application** | **Total score** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | 1.1 Experience in implementing similar projects | 1.2 Experience with working-conditions in developing and/or transition countries. | 1.3 Experience with working conditions in the region or countries as per SPQ. | 2.1 Qualitative assessment of the Applicant’s available Expertise | 2.2 Quantitative assessment of the Applicant’s Human Resource Capacity | 3.1 Form and quality of the application | |  |
|  |  | *[insert max. score as per PQ]* | *[insert max. score as per PQ]* | *[insert max. score as per PQ]* | *[insert max. score as per PQ]* | *[insert max. score as per PQ]* | *[insert max. score as per PQ]* | | *[insert max. score as per PQ]* |
| 1. | *[insert name of Applicant]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | | *[insert achieved score]* |
| 2. | *[insert name of Applicant]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | *[insert achieved score]* | | *[insert achieved score]* |
| *Etc.* |  |  |  |  |  |  |  | |  |

#### Qualitative Evaluation of the Application of *[insert name of Applicant]*

*[Repeat sub-chapters 3.2.1.1 – 3.2.1.3 for each Application considered as substantially responsive as per table 4 above]*

The *following* sub-chapters summarize the findings per criterion of the Applicant. For details see Annex 10.

#### Evaluation of Project References

Project references within relevant time period:

*[provide summary information on total number of project references submitted, project references rejected due to inadequate time period, if necessary add additional criteria in line with PQ document]*

Sub-consultant(s):

*[if relevant provide names of sub-consultants named by the Applicant for consideration during evaluation, as per Form 2 in the PQ document otherwise insert “*Not applicable”*]*

Criterion 1.1 Experience in implementing similar projects

The project references presented fulfil this evaluation criteria *[insert e.g.* “fully”, “to a large extent”, “partially” or “not at all”.

The main reason being: *[provide summary assessment and explanation for deduction of points, number of projects considered eligible, number and reasons of projects not or partially considered, i.e. inappropriate in size, sector or others].*

This results in a **scoring of** ***[insert number of]* points out of *[insert max. number of]* points.”**

Criterion 1.2 – Experience with working conditions in developing and/or transition countries

The project references presented fulfil this evaluation criteria *[insert e.g.* “fully”, “to a large extent”, “partially” or “not at all”.

The main reason being: *[provide summary assessment and explanation for deduction of points, number of projects considered eligible, number and reasons of projects not or partially considered, i.e. working conditions not appropriate etc.].*

This results in a **scoring of** **[insert number of] points out of [insert max. number of] points.**

Criterion 1.3 – Experience with working conditions in *[insert region or list of countries as per PQ]*

The project references presented fulfil this evaluation criteria *[insert e.g.* “fully”, “to a large extent”, “partially” or “not at all”.

The main reason being: *[provide summary assessment and explanation for deduction of points, number of projects considered eligible, number and reasons of projects not or partially considered, i.e. not in regions / countries as required].*

This results in a **scoring of *[insert number of]* points out of *[insert max. number of]* points.”**

#### Evaluation of Available Staff and Personnel Structure

Criterion 2.1 - Qualitative assessment of the Applicant’s available Expertise

The Applicant presented an expert pool (internal & external staff) out of which the required expertise / project team as per PQ could be made up and which fulfil this evaluation criteria *[insert e.g.* “fully”, “to a large extent”, “partially” or “not at all”*]*.

The main reason being: *[provide summary assessment and explanation for deduction of points, if relevant highlight important or missing positions].*

This results in a**scoring of*****[insert number of]* points out of *[insert max. number of]* points*.***

Criterion 2.2 - Quantitative assessment of the Applicant’s Human Resource Capacity

The Applicant submitted a list of permanent staff available in the areas of expertise required for the project supported by an organizational chart amounting in total to *[enlist number of]* experts out of which *[enlist number]* could be considered as relevant for the project including *[enlist number]* % freelance[[1]](#footnote-1) staff. This list fulfil this evaluation criteria *[insert e.g.* “fully”, “to a large extent”, “partially” or “not at all”*]*.

The main reason being: *[provide summary assessment and explanation for deduction of points, i.e. for missing areas of expertise].*

This results in a**scoring of*****[insert number of]* points outof *[insert max. number of]* points.**

#### Evaluation of the Form and Quality of the Application

The appearance and compilation of the Application by the Applicant fulfils the expectation *[insert e.g.* “fully”, “to a large extent”, “partially” or “not at all”*].*

The main reason being: *[provide summary assessment and explanation for deduction of points, i.e. complete, concise, well-structured, to the point, partly / in large parts incomplete, partly / significantly unrelated to the assignment].*

This results in a scoring of ***[insert number of]* points out of *[insert max. number of]* points.***”]*

#### Overall Result of the Evaluation and Ranking

**Table 6 – Overall Result of the Evaluation**

|  |  |  |  |
| --- | --- | --- | --- |
| **No.** | **Name of Applicant** | **Achieved score** | **Ranking / shortlist** |
| 1 | *[insert name of Applicant]* | *[insert achieved score or “disqualified”]* | *[insert ranking]* |
| 2 | *[insert name of Applicant]* | *[insert achieved score or “disqualified”]* | *[insert ranking]* |
| *Etc*. |  |  |  |

***[Note: Signatures have to be on the same page as the below shortlist.]***

Based on the evaluation of the Applications it is recommended to shortlist the following Applicants:

1. [*enlist names of shortlisted Applicants*]
2. [*enlist names of shortlisted Applicants*]
3. [*enlist names of shortlisted Applicants*]
4. [*enlist names of shortlisted Applicants*]
5. [*enlist names of shortlisted Applicants*]

*[Insert place and date of signing]*

Name(s) Signature(s)

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *[insert names and signatures of the tender evaluation committee, incl. Tender Agent, if any]* |  |  |

# **Annexes**

*[In case of an agency contract adapt the Annexes below as indicated in the relevant Annexe.*

*Annexes should be inserted in an unalterable form i.e., screen shots, PDF or photos especially communications regarding approvals, no objections, protocols and clarifications or publications. Annexes consisting of large documents may be attached as separate file to the report in the original format i.e., evaluation matrix in Excel.]*

# **Annexe 1A – PEA Approval of the Prequalification Document**

# **Annexe 1B – KfW No Objection to the Prequalification Document**

*[Or in case of an agency contract delete above text and insert]:*

**Annexe 1 – KfW Approval of the Prequalification Document**

# **Annexe 2A – PEA Approval of the Detailed Application Evaluation Matrix**

# **Annexe 2B – KfW No Objection to the Detailed Application Evaluation Matrix**

*[Or in case of an agency contract delete text above and insert]:*

**Annexe 2 – KfW Approval of the Detailed Application Evaluation Matrix**

# **Annexe 3A – Publication of Original Submission Deadline**

*[insert proof, e.g. screenshot or link of the initial publication in GTAI and in any other media in which the publication took place]*

# **Annexe 3B –** **Publication of Extended Submission Deadline**

*[insert proof, e.g. screenshot or link of publication of the extension in GTAI and in any other media in which the publication took place otherwise insert* “Not applicable”*]*

# **Annexe 4 – Information Meeting Protocol**

*[If applicable, insert information meeting protocol, minimum information: date, time, place, names of participants incl. company details**. If not applicable insert: “*Not applicable*”.]*

# **Annexe 5A – List of Clarifications**

*[if not applicable insert “*Not applicable*” and delete below table; if a different template is used make sure that the below minimum information is included]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No. | Clarification Request | Received | Answer | sent to  Applicants |
| 1. | *[*insert *question]*  *[The text inserted here may not contain any information on the applicant who has submitted the clarification request.]* | *[insert date of receipt of clarification request at the address provided in the PQ document]* | *[insert* answer *\**  *Or in case of agency contract insert: answer \*\*]* | *[insert date]* |

*\* In case of answers including significant modifications to the original PQ document KfW shall be contacted in advance*

*\*\*In case of an agency contract KfW shall be contacted in advance of any clarification prior to publication.*

# **Annexe 5B – Distribution of Clarifications to Potential Applicants**

*[If applicable include proof of distribution to all Applicants (e.g. email screenshot) or proof of publication on GTAI, etc.]*

# **Annexe 6A – Addenda to the Prequalification Document**

*[If not applicable insert “*Not applicable*”.]*

# **Annexe 6B – Distribution of Addenda to Potential Applicants**

*[If applicable include proof of distribution to all applicants (e.g. email screenshot) or proof of publication on GTAI, etc.]*

# **Annexe 7 – Opening Protocol(s)**

*[The Opening Protocol shall contain at least the following minimum information:*

* *date, time, venue of submission deadline*
* *date, time, address of opening/download*
* *names and function of witnesses, e.g. tender evaluation committee, Tender Agent*
* *Statement on the status of the envelopes:*

* timely or delayed delivery,*

* number of Application originals/copies,*

* envelope(s) sealed properly;*

* *Which envelopes remain closed?*
* *Details per individual opening:*
  + *name and address of bidder (in case of JV provide details for all JV partners),*
  + *received in compliance with packing requirements*
  + *the presence or absence of the Declaration of Undertaking*
  + *any modifications to the application submitted prior to the submission deadline*
  + *any other information deemed appropriate or as indicated in the Special Provisions*
  + *signatures of all witnesses]*

# **Annexe 8 – Individual Clarifications during Evaluation**

*[If applicable, insert documentation, e.g. email correspondance, etc. If not applicable, insert „*Not applicable*“.]*

# **Annexe 9 – Members of the Tender Evaluation Committee**

*[insert names of members, minimum three out of which one member shall not be staff of the PEA’s organization]*

*[In case of an agency contract insert “*Not applicable*”]*

# **Annexe 10 – Detailed Application Evaluation Matrix**

*[insert detailed and completed evaluation matrix or present it as a separate Annexe]*

1. Freelance staff can be considered if long time relation exists, see FORM 6 of the PQ document [↑](#footnote-ref-1)