

**REPUBLIC OF LEBANON**  
**OFFICE OF THE MINISTER OF STATE FOR ADMINISTRATIVE REFORM**

**NATIONAL ADMINISTRATIVE REHABILITATION PROGRAMME**  
**( N.A.R.P.)**

**ASSISTANCE TO THE**  
**RE-ESTABLISHMENT OF THE LEBANESE ADMINISTRATION**  
**( A.R.L.A.)**  
**PROJECT**

**PROGRAMME MONITORING CONSULTANCY**  
**BIDDING**

**TENDER EVALUATION PROCEDURE**

September 1998

*(Final Version)*

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**REPUBLIC OF LEBANON**  
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**I. PREAMBLE**

This Tender Evaluation Procedure (TEP) is based upon the provisions set out in the tender dossier, namely:

- the "two-envelopes system" defined in article 46 of the "Procedures and Instructions for Tendering" (PIT);
- the procedures described in articles 23 to 31 of the "General Conditions for Public Service Contracts".

Accordingly, this procedure was drawn up in accounting for the following documents only:

- the tender dossier;
- the minutes of the bidders meeting;
- any correspondence which may be sent to all tenderers by the contracting authority during the tender period (articles 20 and 21 of the "General Conditions").

The following rules shall be considered as compulsory:

- (a) no change can be made to the TEP, nor to the appraisal criteria and quotation system, after the tender opening;
- (b) any request from, or information provided by a bidder during the evaluation period, which would entail changes in the content of its tender proposal shall be totally disregarded;
- (c) the TEC shall never disclose any detailed information whatsoever regarding the tender appraisal findings and conclusions to any party other than the Contracting Authority's Representative and the Head of the Delegation of the European Commission. Even then, the latter parties shall not be informed of the quotation details before the signature of the Tender Evaluation Report by all members of the TEC.

**II. TENDER OPENING**

The tender opening shall take place on the date and time fixed in the letter of invitation to tender, according to the provisions of article 23 of the General Conditions.

The chairman and members of the Tender Evaluation Committee (TEC) shall be appointed the OMSAR. The Commission will be represented in the Committee by an observer appointed in consultation with the OMSAR. The MEDA national coordinator (CDR) will be invited as an observer.

The chairman of the TEC will record the date and time of the tender opening, the place of opening, the participants and the documents received. The TEC shall then examine and record any irregularity which would be readily evident from the covering letter or the presentation of the documents, such as:

- the participation of a non-short-listed European firm (except as a minor sub-consultant);
- an non-sealed tender price envelope (which should be sealed immediately, without removing the contents, and signed on the outside by two members of the TEC with a brief statement as to how the envelope came to be opened).

The tender opening and the drawing up of the minutes of meeting shall comply with the procedure set out in article 23 of the "General Conditions".

Tender price envelopes shall be retained by the chairman of the TEC in safe location until those are to be opened. The technical and financial original documents should not be marked in any permanent way during the course of the tender evaluation. One set of the winning originals shall be sent to the Delegation of the Commission for approval of the award of the contract.

The TEC may decide to appoint a team of assessors, among its members, in order to form a technical evaluation sub-committee which would carry out the technical appraisal of the tenders.

### **III. COMPLIANCE WITH ADMINISTRATIVE REQUIREMENTS**

In accordance with the provisions of Article 23 and 26 of the General Conditions, the TEC (or appointed team of assessors) will first check that all technical proposals comply especially with the requirements set out in:

- Article 46 of the Procedures and Instructions for Tendering;
- Articles 12 and 13, and Articles 36 to 47 (as amended in Document I and II of the Tender Dossier) of the "General Conditions".

Any submittal rejected at this stage shall no longer be considered in the technical appraisal.

### **IV. SCORING SYSTEM**

Criteria to be used in assessing the technical proposals address three fields of appraisal:

- (a) the quality of technical proposals including:
- the overall understanding of the objectives and role of the consultancy,
  - the general approach of the services required,
  - the proposed methodology and organisation,
  - the planned head-office support and supervision,
  - the proposed equipment of the PMC team;
- (b) the competence and coherence of the proposed PMC team.

The scoring system is based upon the background information provided to the tenderers and the specific requirements of the tender dossier.

The rating of technical proposals will be worked out upon a total of 1000 points allocated as follows:

<i>Field of Appraisal</i>	<i>Total Points</i>	<i>%</i>
Quality of Technical Proposals	375	37.5
Competence & Coherence of PMC Team	625	62.5
<i>Total</i>	1 000	100

The first main item is the quality of the technical proposal, i.e. the methodology proposed by the tenderer. This will demonstrate how the bidder understands and interprets the terms of reference and how he intends to carry out the services.

However, the major field of appraisal is the competence and coherence of the proposed consultancy team. The quality of the proposed PMC staffing is a critical factor in the implementation of the project and, therefore, is allocated 62.5 % of the total scoring.

The scoring system is summarised in the tables shown in appendix A. Evaluation methods and the breakdown of scoring figures are detailed in the following section. Calculation details are provided, where required, in the relevant appendices.

## **V. TECHNICAL EVALUATION METHOD**

This section is geared at describing the main steps and guiding rules to be observed in appraising the tenderers' technical proposals. Further details are included, as appropriate, in referenced appendices.

The terms of reference provide a comprehensive description of the services, expert assignments and specific tasks required from the consultancy. Therefore, tenderers should comply with this requirements.

Notwithstanding, alternative allocation of experts and/or man/months effort may be proposed by the bidders, that could be considered as relevant and acceptable by the TEC. Accordingly, a reconciliation table<sup>(1)</sup> is provided to the tenderers during the bidders' meeting. Any such alternative shall be considered only if this reconciliation table is included in the technical proposal.

### **5.1 QUALITY OF TECHNICAL PROPOSALS (refer Appendix A)**

This second field of appraisal is awarded a maximum score of 300 points (30% of total). It includes the following five groups of criteria:

<i>Group of Criteria</i>	<i>Points</i>	<i>% of Total</i>
Overall understanding of the consultancy	50	5
General approach of the consultancy	95	9.5
Proposed methodology and organisation	180	18.0
Head-office support and supervision	35	3.5
Proposed hardware and software	15	1.5
<i>Sub-total this field</i>	<i>375</i>	<i>30.0</i>

(1) Refer Appendix C.

### **5.11 Overall understanding of the consultancy**

This group of criteria aims at assessing the quality of the analysis of the TOR by the tenderers and their efforts in investigating the context of the project while visiting Lebanon on the occasion of the bidders' meeting.

Appraisal will be based upon tenderer's comments on and interpretation of the TOR, as well as specific details brought out through these comments.

### **5.12 General approach of the consultancy**

This set of criteria is geared to appraising the general design and practical approach of the consultancy proposed by the bidders.

Seven criteria will be used which encompass the whole services required from the consultancy.

### **5.13 Proposed methodology and organisation**

The methodology and organisation proposed by the various bidders will be assessed through eight criteria.

This set of criteria aims at demonstrating the tenderers' capacity to properly respond to expectations and comply with TOR requirements in (i) setting up an appropriate organisation of the PMC itself and (ii) implementing efficient working methods and planning.

Special attention shall be paid to the description of activities proposed for the implementation of the inception phase of the consultancy.

In addition, any formalised method proposed by the tenderers in order to carry out the services and to measure the performance of the PMC (e.g. project management method) should be carefully assessed.

### **5.14 Head-office support and supervision**

The content, quality and relevance of this backup from the consultancy team's head-office also needs careful scrutiny as it might prove essential in the proper functioning of the PMC, especially regarding the timely, appropriate and efficient provision of short-term expertise.

### **5.15 Proposed hardware and software**

This relates to the tenderer's own equipment and software planned to be used in implementing the above proposed working methods and tools.

Hardware and software will be evaluated in terms of (i) compatibility with OMSAR's network, (ii) expandability/flexibility, (iii) user friendliness, and (iv) bidder's experience in their use.

## 5.2 SUITABILITY OF PROPOSED CONSULTANCY TEAMS

This field is the most important one in the tender evaluation. Accordingly, it accounts for the largest score with a maximum of 500 points (50% of total). This field of appraisal encompasses six sub-headings as follows:

<i>Sub-Headings</i>	<i>Appendix Reference</i>	<i>Points</i>	<i>% of Total</i>
PMC team leader	B	130	13.0
Long-term core team of experts	C	200	20.0
Consistency of the long-term core team	D	40	4.0
Medium & short-term expertise	E	140	14.0
Associated local consultants	F	80	8.0
Head-office supervisor	G	35	3.5
<i>Sub-total this field</i>		625	62.5

### 5.21 PMC team leader

The qualifications, experience, skills and overall suitability to the job of the PMC team leader will be appraised using the rating criteria detailed in Table 2, appendix B.

### 5.22 Long-term core team of experts

The appraisal of the capacity and suitability of the long-term team of experts will be carried out as detailed in appendix C. This evaluation will include:

- an appraisal of the competence of each expert and of its capacity to fulfil its proposed assignment (Table 3);
- a weighted consolidation of individual scores accounting for the m/m contribution of each expert to the overall team's effort (Table 4).

This evaluation shall be carried out with reference to the task and profile descriptions provided in appendix B to the TOR.

### 5.23 Consistency of the long-term core team

The purpose of this set of criteria (refer appendix D, Table 5) is to account for the overall homogeneousness of the long-term team, and give greater importance to a "team approach" of the consultancy.

### 5.24 Medium and short-term expertise

The TOR provide a list of potential medium and short-term expertise which will be most probably required over the consultancy period. While these requirements are to be ascertained during the course of the consultancy, tenderers are expected to provide CVs for most of the fields mentioned in the TOR. The evaluation process of this required support is detailed in appendix E, table 6 and 7.

**5.25 Associated local consultants**

Part of the m/m budget earmarked for medium and short-term expertise can be used by the tenderers to supplement the capacity of their teams with the support of associated local consultants. The evaluation of the local consultants' contribution is described in appendix F, table 8 and 9.

**5.26 Head-office supervisor**

The PMC's head-office support and monitoring is a basic guarantee of an appropriate performance of the consultancy. As this relates mostly to the experience and capacities of the tenderer's appointed supervisor, his CV will also be appraised according to table 10 criteria (refer appendix G).

**VI. RANKING OF TECHNICAL PROPOSALS**

When the technical evaluation of all tenders will be achieved and the "Summary Table", shown in appendix A, will be completed, the technical proposals shall be ranked according to the following procedure:

**6.1 Classification of Technical Proposals**

Technical proposals shall be classified in the following categories:

<i>Rating</i>	<i>Category</i>	
Score $\geq$ 930	A	Excellent
$800 \leq$ Score $<$ 930	B	Very Good
$700 \leq$ Score $<$ 800	C	Good
$600 \leq$ Score $<$ 700	D	Average
Score $<$ 600	E	Poor

All proposals falling into the same category shall then be considered as equivalent. Their individual score shall no longer be considered. Tenders classified as "poor" shall be excluded from further consideration. The TEC may also decide to exclude "average" tenders.

A technical evaluation report shall be prepared and approved by the TEC. This report shall be signed by all members of the TEC.

**6.2 Interview of Proposed PMC team leader**

As sophisticated as the appraisal system may be, the evaluation of proposed consultancy services cannot be fully accurate.

Therefore, should the "technical evaluation sub-committee" have any significant doubt about the suitability of PMC team leader proposed in submittals falling into the top category, interviews of



these consultants<sup>(2)</sup> could be organised in Beirut before finalising the above classification of technical offers.

The "technical evaluation sub-committee" may also propose the TEC to carry on with the opening of tender price envelopes, while advising to further assess the suitability of key staff proposed by the selected firm/consortium.

In that event, the selected tenderer may be requested:

- either to propose alternative staff,
- or to send the consultants concerned to Beirut for interview.

Whatever staff changes are made in the proposed PMC team, prior to the signature of the contract, no alteration of tender prices shall be accepted.

## **VII. OPENING OF TENDER PRICE ENVELOPES**

Once the technical evaluation report is approved, the TEC can proceed with the opening of the tender price envelopes for those tenders falling into the top category only (A, excellent).

The financial compliance and arithmetical accuracy of the offers shall first be checked. Then, the tender shall be awarded according to the rules laid down in the Manual of Procedure MEDA, Part II, para. 7 (Rev. 11 1/9/1998).

The TEC may declare the tender process "unsuccessful" in the circumstances mentioned in article 27 of the General Conditions.

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(2) Obviously, a limited number of them.

# TENDER EVALUATION PROCEDURE

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OFFICE OF THE MINISTER OF STATE FOR ADMINISTRATIVE REFORM

PROGRAMME MONITORING CONSULTANCY

( P. M. C. )

## APPENDICES

*Tender Evaluation Tables*

# TENDER EVALUATION PROCEDURE

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## APPENDIX A

### TECHNICAL PROPOSAL SCORING

#### *SUMMARY EVALUATION TABLE*

The "summary table" 1, below, will be used as:

- a basis for the appraisal of the tender proposals;
- a consolidation table for the ranking of technical offers.

The first two fields of appraisal<sup>(1)</sup> of the technical offers shall be evaluated using this table only, while the third one shall be assessed using specific tables shown in appendix B to G, which results will be consolidated under section 3 of the "summary table".

### 1. Appraisal techniques and recommendations

- (i) In order to ensure an equitable and consistent rating of the technical proposals, the evaluation of all tenders should be carried out in parallel. All tenders should be assessed in parallel for each group of criteria. When completed for any group of criteria and before proceeding with another group, the evaluation should be cross-checked to avoid any discrepancy in the quotation of tenders.
- (ii) The assessors should first work independently, as opposed to jointly. Then they should compare and possibly justify their quotations. If different quotations are maintained, the various scores shall be averaged. However, each assessor should keep record of its own quotation.
- (iii) The assessors should not "guess-in" information. If a tenderer did not provide the appropriate information, the quotation should be marked down accordingly.
- (iv) During the evaluation process, nationality shall not be a subject of consideration. The only concern of the assessors shall be to check that (i) the tenderer has its head-office registered in the EU, (ii) the associated local consulting firm is registered in Lebanon, and (iii) the consultants proposed are nationals of an EU member state or of the Republic of Lebanon. The basic principle is that, following the approval of the short-list, all tenderers and their European personnel are simply European.

### 2. Scoring method

When scoring tender proposals using non-calculated criteria, it is strongly advised to use a simple and straight forward quotation method. An easy and rather objective method is the following:

- proposals should be ranked in five categories, from "poor" to "excellent";
- each category should be allocated a scale of points.

Most criteria being a multiple of five, this allocation of points should prove very easy. As an example, the following scale could be used for the PMC tender evaluation.

<i>Maximum Score</i>	Excellent	Very good	Good	Average	Poor
5	5	4	3	2	1
10	9 or 10	7 or 8	5 or 6	3 or 4	1 or 2
15	13 to 15	10 to 12	7 to 9	4 to 6	1 to 3
20	17 to 20	13 to 16	9 to 12	5 to 8	1 to 4
25	21 to 25	16 to 20	11 to 15	6 to 10	1 to 5
30	25 to 30	19 to 24	13 to 18	7 to 12	1 to 6

(1) Refer "Tender evaluation procedure", sub-section 5.1 and 5.2 .

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20	17 to 20	13 to 16	9 to 12	5 to 8	1 to 4
25	21 to 25	16 to 20	11 to 15	6 to 10	1 to 5
30	25 to 30	19 to 24	13 to 18	7 to 12	1 to 6

(1) Refer "Tender evaluation procedure", sub-section 5.1 and 5.2 .



**APPENDIX B**

**TECHNICAL PROPOSAL SCORING**

*PMC TEAM LEADER*

The CV of each proposed team leader shall be assessed very carefully in respect of the criteria detailed in the attached table 2.

As a model CV was provided to the tenderers<sup>(1)</sup>, all CV should be rather easily compared.

It is strongly advised to carry out the assessment of all CV in appraising their consistency in relation to each group of criteria, in sequence:

- first, all CV should be evaluated with regard of group of criteria no 1 "Qualifications;
- then, they should be evaluated in respect of group 2;
- the same procedure should apply to all groups of criteria.

Once the evaluation is completed, total scores (maximum = 400 points) shall be divided by 4 (four) and the results brought forward in the "summary table" (Appendix A).

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(1) Refer Tender Dossier, Document II, Annex C.



APPENDIX C

**TECHNICAL PROPOSAL SCORING**

*LONG-TERM TEAM OF EXPERTS*

APPENDIX D

**TECHNICAL PROPOSAL SCORING**

*CONSISTENCY OF THE LONG-TERM TEAM*

Table 5, below, includes three criteria geared at appraising the overall homogeneousness and coherence of the PMC long-term core team. All long-term expert's CVs shall be considered, including alternative ones, if any.

### **1. Average number of years with firm**

Each long-term consultant's number of years with the tendering firm will be added. Then, the total of years will be divided by the number of experts proposed by each tenderer.

Teams shall be ranked according to their respective average number of years and will be quoted accordingly (maximum score = 10).

### **2. Common previous assignments**

The coherence and efficiency of the PMC long-term team would be increased significantly, should the team members have shared a number of common assignments already.

Therefore, these common assignments shall be identified from the CVs and added up. Teams shall be ranked according to the total common assignments of their members and will be quoted accordingly (maximum score = 10).

### **3. Average quotation of the long-term team members**

An homogeneous level of qualification and experience among the members of the PMC long-term team is a factor critical for the overall performance of the consultancy.

Therefore this criterion is based upon the calculation of an average quotation of the team using the individual score of each long-term expert as shown in Table 3 (refer Appendix C). These individual score shall be added and the total divided by the number of long-term experts of each proposed PMC team.

The teams shall be ranked according to their average quotation and awarded points as described in sections 1 and 2, above.

APPENDIX E

TECHNICAL PROPOSAL SCORING

*MEDIUM & SHORT-TERM EXPERTISE*

Medium and short-term expertise will be required from the selected consulting firm/consortium, covering a large variety of technical specialities. The required fields of expertise (25) are listed in appendix B to the TOR. According to the Tender Dossier, tenderers are expected to provide CVs of specialised consultants for most of the fields identified in the terms of reference. All CVs shall be assessed in respect of the relevant fields of expertise.

Notwithstanding, the evaluation has to account for the fact that part of the PMC's budget earmarked for this medium or short-term support can be used to associate local consultants to the provision of the services required. As this might entail discrepancies in the man/months effort (European staff) of each tenderer, the various proposals will be compared according to their relative m/m contribution.

Therefore, the following procedure shall be applied.

### **1. Individual appraisal of the medium & short-term specialists**

All proposed CVs shall be appraised using Table 6 criteria. This Table 6 provides for the possible presentation of alternative CV for the same field of expertise. A separate table will be established for each tenderer and field. In order to ensure an equitable scoring, the evaluation of the medium and short-term specialists shall be carried out in sequence, by field of expertise.

Should the tenderer propose alternative CVs for the same field, these CVs would be assessed separately and the best score only would be accounted for in the next step of the procedure. If the same specialist is presented for more than one field, his CV shall be quoted in respect of each field.

When all tables 6 will be completed, total scores will be carried forward to Table 7. There shall be only one score per tenderer and field.

### **2. Contribution to the required fields of expertise**

All scores brought forward in Table 7 shall be added. Then two different cases may occur:

*(i) At least 20 fields of required expertise are covered*

The total score of the tenderer concerned shall be divided by the number of fields covered (i.e.  $\geq 20$ ), giving a weighted quotation of a maximum of 100 points.

*(ii) Less than 20 fields of required expertise are covered*

The total score of the tenderer concerned shall be divided by 20, irrespective of the number of fields covered.

### **3. M/M contribution of European specialists**

The weighted score of each tenderer shall be adjusted to account for the proposed m/m contribution of European specialists. The highest number of m/m proposed shall serve as a reference and the score of all other tenders shall be applied a ratio calculated as follows:

$$\text{m/m contribution} / \text{highest contribution}$$

The adjusted evaluation of each tender shall be carried forward to section 3.4 of the "summary table".

**APPENDIX F**

**TECHNICAL PROPOSAL SCORING**

*ASSOCIATED LOCAL CONSULTANTS*

The terms of reference of the PMC provide that:

- part of the m/m budget earmarked for medium and short-term specialists can be used to associate local expertise to the consultancy team<sup>(1)</sup>;
- local consultants shall be associated to long-term experts or medium-term specialists in the performance of the services<sup>(2)</sup>;
- local experts will supplement the capacity of the expatriate members of the consultancy team, in order to respond efficiently to specific requirements in the performance of the services;
- potential fields of intervention encompass all services required from the consultancy team<sup>(2)</sup>.

A list of potentially required fields of expertise (14) is also provided in appendix B to the TOR.

Thus, the contribution of local experts:

- will include long, medium and short-term expertise;
- may cover most of the services required from the PMC;
- will evolve according to the project's implementation requirements.

Subsequently, while the identification of the fields of expertise required can be rather accurate, the allocation of m/m among these fields cannot be estimated at this stage.

Therefore the rating of qualifications and experience of local consultants will not be weighted according to individual m/m contribution. Otherwise, the evaluation process of the local consultants' contribution will be similar to the one described above for expatriate medium and short-term specialists.

## **1. Individual appraisal of local consultants**

All proposed CVs shall be evaluated using the criteria listed in the attached Table 8. A separate table will be drawn up for each field of expertise/tenderer.

Consistent with the rule applied all the way through the evaluation process, the appraisal of the local consultants shall be carried out in sequence, by field of expertise.

In accounting for the above-mentioned requirements of the TOR, tenderers will, most probably, present several CVs for each field of expertise.

Therefore, all these CVs shall be appraised separately and quoted using the Table 8 framework. If a same consultant is presented for more than one field of expertise, his CV will be assessed regarding each field of assignment.

When all tables 8 will be completed, total scores will be averaged according to the number of consultants assigned to each field. The averaged scores shall be carried forward to Table 9.

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(1) TOR, sub-section 6.1.

(2) TOR, Appendix B, section IV.

## **2. Contribution to the required fields of expertise**

All scores brought forward in Table 9 shall be added. Then two different cases may occur:

*(i) At least 10 fields of required expertise are covered*

The total score of the tenderer concerned shall be divided by the number of fields covered (i.e.  $\geq 20$ ), giving a weighted quotation of a maximum of 70 points.

*(ii) Less than 10 fields of required expertise are covered*

The total score of the tenderer concerned shall be divided by 10, irrespective of the number of fields covered.

## **3. M/M contribution of local consultants**

The weighted score of each tenderer shall be adjusted to account for the proposed total m/m contribution of associated local consultants. The highest number of m/m proposed shall serve as a reference and the score of all other tenders shall be applied a ratio calculated as follows:

$$\text{m/m contribution} / \text{highest contribution}$$

The adjusted evaluation of each tender shall be carried forward to section 3.5 of the "summary table".



The evaluation of the qualifications and experience of the Head-Office Supervisor (refer criteria listed in attached Table 10) shall be carried out in the same way as that of the Team Leader.

Then the total score shall be divided by 5 and carried forward to section 3.6 of the "summary table (refer Appendix A).