



EMBASSY OF SWEDEN

Lusaka

PROCUREMENT DOCUMENT

**Procurement: Framework Agreement for Audit Services
2022-2024 – Embassy of Sweden in Lusaka**

Procedure: Swedish Public Procurement Act

Reference number: UM2022/11612/LUSA

Important information

Tenders must be delivered to the Embassy of Sweden, Haile Selassie Avenue, Lusaka, no later than 15 July 2022 at 16.30 hours.

The Embassy of Sweden in Lusaka recommends that the tenderer, as soon as possible after receipt of this invitation, take note of the requirements in this dossier. Some of the requested documentation may have to be obtained from designated authorities, which can result in long lead times. Note that requirements defined as “must” or “shall” are mandatory and must be fulfilled in order to qualify for evaluation.

Questions and requests for clarification or additions to the procurement document shall be submitted in writing via procurement.lusaka@gov.se and marked with UM2022/11612/LUSA. The deadline for submitting questions is: 27 June 2022 at 16.30 hours.

Response (QA) to questions will be posted at the Embassy’s website at:
www.swedenabroad.se/Lusaka

1. General orientation

1.1. Overall description of the procurement

The Embassy intends to enter contracts with three (3) audit firms assuming that at least three comply with the requirements stated in this Invitation to Tender. The Embassy aims at concluding the Framework Agreement to apply from 19 September 2022 and remain in force until 18 September 2024, i.e. a period of two years. The contracts may be extended twice with unaltered conditions for a period of twelve months for each extension.

1.2. Information on the contracting authority

The Embassy of Sweden in Lusaka

Haile Selassie Avenue
Lusaka, Zambia

The overall mission of the Embassy of Sweden in Lusaka is to strengthen and build on the relationship between Sweden and Zambia, through political dialogue, development cooperation, trade promotion and cultural exchange. The Embassy acts bilaterally, through the European Union (EU) as well as within the United Nations (UN).

Swedish policies in support of peace, democracy, human rights, security, development and free trade aim at benefiting global as well as Swedish interests. New global challenges, such as climate change, require common solutions and partnerships.

For more information, please see www.swedenabroad.se/Lusaka

1.3. Eligible to call-off

Only the Embassy of Sweden in Lusaka will be entitled to make call offs from the framework agreement.

1.4. Purpose and background of the procurement

The section for bilateral development cooperation with Zambia at the Embassy of Sweden in Lusaka has currently a portfolio of approximately 40 projects with an approximate budget of 450 MSEK per year. The annual budget is split in different areas which include human rights and democracy, health, economic development, renewable energy, environment and climate.

The Swedish Government intends to decide on a new Strategy for Sweden's Development Cooperation with Zambia to replace the current strategy that expires in 2022. The proposed Strategy Objectives remain within the areas of the current strategy.

The framework agreement presented here is aimed for audit services where the Embassy is contract holder: The agreements Sweden hold with partner organisations grant the Embassy the

right to commission special audits of partners, such as value for money audits, expenditure verifications, efficiency audits etc, for which the Embassy will be the contracting party. These framework agreements will be used for such audits. Under special circumstances, it could also be an annual financial audit at a partner organization, where the Embassy then is the contract holder.

Furthermore, in connection with the preparation of possible support to institutions and organizations, the Embassy might also commission pre award audits, capacity studies or internal control reviews. Such pre-award audits form important parts of the assessment and give guidance to the design of the collaboration between the Embassy and the partner organisation. In suspicion of embezzlement and other corrupt practices, the Embassy need to call for investigative reviews and forensic audits on short notice.

The Embassy also wants the framework agreements to include the possibility to call off advisory services and training sessions with Embassy staff and partner organisations.

It should be noted that the Framework Agreement will not include any guarantees of volume of services to be required/provided.

1.5. Description of the services to be procured

The audit services in this procurement of framework agreements include

- (1) Audits, reviews, assessments without assurance
Reviews in accordance with agreed upon procedures, internal control assessments, spot checks, expenditure verifications, value for money audits, performance and compliance audits etc.. This could also include certain investigative aspects, for example when conducting spot checks.
- (2) Financial audits with assurance
- (3) Forensic audits and investigative reviews
- (4) Trainings and capacity building of Embassy staff as well as partner institutions, authorities and organisations on audit matters
- (5) Guidance in audit matters

1.6. Framework agreement period

The framework agreement period runs for 24 calendar months. The Embassy is entitled (though not obligated) to extend the framework agreement twice with 12 calendar months, with unaltered terms and conditions. The total framework agreement period shall not exceed 48 calendar months. The framework agreement start date is estimated at: 19 September 2022

1.7. Volumes

During the framework agreement period of maximum 4 years, the estimated value is approximately SEK 10 000 000, excluding VAT.

The maximum value of the framework agreement is in total SEK 10 000 000 excluding VAT. If this maximum budget is reached, the framework agreement is terminated.

No guarantee of obtaining a certain volume is provided.

1.8. The opportunity to submit a tender on all or part of the procurement

Tenders shall cover the entire procurement.

1.9. Reasons relating to the decision not to divide the framework agreement

The reason for the procurement not being divided into different lots is that it is likely that the Embassy needs to call for assignments where at least two different kinds of audit services are combined.

1.10. Appendices

The procurement document relating to this procurement includes the following appendices:

Appendix 1 - Terms of Reference

Appendix 2 - Draft of the framework agreement

Appendix 3 - Sida's General Conditions for Framework Agreements and Contracts 2021.1

Appendix 4 - Self declaration

Appendix 5 - Declaration of honour

Appendix 6 - Language level definition

Appendix 7 - Personal data processing agreement

Appendix 8 - CV template consultant category 1

Appendix 9 - CV template consultant category 2

Appendix 10 - Call-off inquiry ranked framework agreement

Appendix 11 - Call-off inquiry renewed competitive tendering

2. Administrative terms and conditions

2.1. Procurement procedure

The procurement is carried out through an open procedure, in accordance with the Swedish Public Procurement Act (2016:1145), also known as LOU. The procedure does not allow negotiation. Therefore, it is of great importance that the best possible terms and conditions are submitted in the tender.

2.2. Prerequisites for tender submission

2.2.1. Submission of the tender

The tender and all associated documents shall be delivered to the Embassy of Sweden, Haile Selassie Avenue, Lusaka, no later than 15 July 2022 at 16.30 hours. The tender must include physical copies of all tender documents. Applicants should also submit an electronic copy on a USB-stick. Mark the tender with UM2022/11612/LUSA and clearly indicate a contact person, address, phone number and e-mail for any potential communication.

The tenderer is not entitled to claim compensation for work or other costs associated with participating in the procurement.

2.2.2. The form of the tender

The tender must include physical copies of all tender documents. Applicants should also submit an electronic copy on a USB-stick. Note that the text needs to be searchable, i.e. not scanned, in order to facilitate the evaluation process. All electronic documents in the tender shall be saved in a commonly used format, such as .doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf, .txt, .jpg and .tif. If the tender versions on the USB-stick differ, the paper copy will take precedence over the electronic copy. CD-discs are not accepted.

References to information in the form of links to web pages and unsolicited attachments will not be considered to constitute part of the tender and will not be taken into account in the review and evaluation of the tender.

In order to facilitate examination and evaluation of the tender, it is the Embassy's strong desire that the submitted tender be formatted in accordance with the procurement document's headings/disposition, that any templates belonging to the procurement document be used and filled in, and that references to any attachments be presented in a clear manner.

2.2.3. The language of the tender

The tender shall be written in English.

2.2.4. Tender submission deadline

The deadline to submit a tender is 15 July 2022 at 16.30 hours.

2.2.5. Period of validity of the tender

The tender shall be valid until 31 January 2023.

2.2.6. Variant tenders or alternative tenders

Variant tenders or alternative tenders are not permitted. If the tenderer submits provisions or reservations pertaining to the conditions in the procurement document, the tender may be rejected. The tenderer is therefore asked to avoid providing information and attachments that have not been requested.

2.3. Clarification, additions, or questions on the procurement document

If the procurement document is considered to be unclear, or if some of the requirements set forth are unreasonable, abnormally costly or restrictive of competition in any respect, it is important that the Embassy be contacted as soon as possible so that misunderstandings can be avoided.

The Embassy is under no obligation to request additions or clarifications by the tenderers, and the opportunities for correcting shortcomings in submitted tenders are limited and depend on the nature of the deficiency. It is therefore important that the tenderer ensure that all requested information and documents are provided in the tender.

Requests for clarification or additions to the procurement document shall be submitted in writing via procurement.lusaka@gov.se and marked with reference number UM2022/11612/LUSA. The deadline for submitting questions is: 27 June 2022. The Embassy cannot guarantee that questions received later than this day will be answered. Answers to questions will be published no later than 30 June .

Responses to questions will be posted on the Embassy's website at: www.swedenabroad.se/Lusaka. Published questions and answers, as well as any clarifications and additions submitted during the tender period, constitute part of the procurement document.

2.4. Notification of decision

Notification of award decisions will be sent out to the Tenderers contact person's address stated its tender.

The reception of a notification regarding the award decision does not mean that a binding framework agreement has been signed between the Embassy and the winning tenderer. A framework agreement only becomes legally binding when it has been signed by both parties.

Framework agreements will be signed no sooner than ten (10) days after the date on which the notification of the award decision is sent to the tenderers.

The Embassy can cancel the procurement if there are objective reasons, such as lack of competition, unforeseen events or too high prices. If the procurement is canceled a decision will be notified to all tenderers.

2.5. Confidentiality

As soon as the award decision has been sent to all tenderers, all documents relating to the procurement, including tenders, become subject to the principle of public access to official documents. If a tenderer considers that it may suffer damages if information provided in the tender should become public, the tenderer shall submit a written request for confidentiality containing **a)** the information to which the request for confidentiality pertains and **b)** what economic damages the tenderer would be suffered if the information should be disclosed.

Upon request for disclosure of tender documents, the Embassy will in each case review any request for confidentiality submitted by a tenderer. The Embassy's assessment regarding confidentiality may be appealed to the administrative court. The Embassy can therefore not guarantee that the information in the tender will not be revealed to the public.

2.6. Examination and evaluation

The framework agreements will be awarded to the most economically advantageous tender, as determined according to the following basis: Best price-quality ratio

The examination and evaluation of submitted tenders will be carried out in steps (described below), on the basis of the information provided by the tenderer in its tender, together with the supplementary documents.

Step 1 – Examination of tenders

In the first step, the Embassy will examine whether the submitted tender is complete and whether the requirements outlined in the section “Administrative terms and conditions” and in the section “Requirements for tenderers” have been met. The tenders that meet these requirements advance to Step 2; all other tenders will be rejected.

Step 2 – Examination of the object of the procurement

In Step 2, the Embassy will examine whether the tender meets the requirements associated with the object of the procurement, which are outlined in the section “Requirements for services.” The tenders that meet these requirements advance to Step 3; all other tenders will be rejected.

Step 3 – Evaluation

In Step 3, the tender is evaluated in accordance with the evaluation methodology, as set forth in the section “Evaluation of tenders.”

Step 4 – Qualification of tenderers

Prior to offering to sign the framework agreements, the Embassy will verify whether the requirements set forth in the section “Requirements of tenderers” is fulfilled by requesting information or evidence according to section “Qualification of tenderers”.

2.7. Call-off procedure

Combined call-off procedure

Call-off orders are implemented through a combination of a fixed ranking system and renewed competitive tendering.

Fixed ranking system

a) Call-off orders equal to or below 160 working hours are implemented through a ranking system.

b) Forensic and investigative audits are implemented through a ranking system due to the urgency of such matters.

When calling-off, the top-ranked framework agreement supplier (in the ranking system) shall be selected. The top-ranked supplier is obliged to respond to the call-off enquiry as soon as possible, however at the latest within two (2) working days after the call-off. It is the responsibility of the supplier that has accepted and confirmed the call-off within two (2) business days as described above to provide the Embassy with a work plan for the proposed assignment as soon as possible, but no later than three (3) working days after the confirmation. Assignments must be commenced no later than two weeks after confirmation of the call-off enquiry.

If the ranked number one supplier declines or fails to respond to the call-off inquiry within two (2) working days, then the contracting authority has the right to issue the call-off inquiry to the next supplier in the ranking system, i.e., the framework supplier that was ranked second, and so on. The requirements in the call-off enquiry may not be changed when moving to the next supplier in rank.

Renewed competitive tendering

Call-off orders above 160 working hours are implemented through renewed competitive tendering. The call-off enquiry is issued to all suppliers contracted through framework agreements to provide responses to the call-off order in accordance with the terms and conditions laid out in the framework agreement and Terms of Reference.

One (1) supplier will be accepted, provided that as many eligible offers are received.

Contracts will be awarded to the tenderer who has submitted the most economically advantageous tender in the renewed competition, according to the following basis:

Best price-quality ratio

Award criteria to be assessed at renewed competitive tendering include, for example:

- Competences and qualifications
- Project organisation
- Method
- Timeline and work plan
- Price

2.8. Contract terms and conditions

The tenderer shall accept the attached framework agreement draft, including appendices (including Sida's General Conditions for Framework Agreements and Contracts and the Terms of Reference).

2.9. Personal Data Processing

The tenderer shall accept the personal data processing agreement in Appendix 7.

3. Requirements for tenderers

3.1. Self-declaration by tenderers

The tenderer must either respond to all the requirements in the section "Requirements for tenderers" in this procurement document or reuse a previously completed ESPD . If the tenderer chooses to reuse an ESPD , the document must be attached to the tender as an xml or pdf file .

If the bidder chooses to reuse an ESPD the bidder is obliged to make sure that all the criteria in section "Exclusion grounds" and section "Qualification Requirements" in the Self Declaration by Tenderer (see Appendix 4) have been answered in the attached ESDP.

3.2 Reliance on the capacity of other companies

A tenderer may invoke the capacity of other undertakings to meet the requirements relating to economic and financial standing under point 2.2 or technical and professional capacity under point 3 in the Self Declaration by Tenderer. Other companies refer to natural or legal persons such as subsidiaries or sister companies within a group or a partner.

Tenderers who invoke the capacity of other companies must in the tender provide a special declaration regarding all the requirements set out in the section "Exclusion grounds" in the Self Declaration by Tenderer for each of the companies whose capacity is invoked.

Tenderers who wishes to exercise this right must, at the request of Sida, state the function that the company is to fulfil and submit a commitment from the company in question or otherwise demonstrate that the tenderer will have the necessary resources when the contract is to be fulfilled. The proof can consist of a parent company guarantee, cooperation agreement or the such a document.

The tenderer must without delay and on request submit documentation in accordance with the section "Qualification of tenderers" in this procurement document which proves that the above requirement is met.

NOTE, subcontractor (s) to be used for the performance of requested services (ie the object of the procurement) are not to be considered as invoked companies.

3.3 Consortia

Joint bidding refers to the situation that the tenderer is not an individual legal or natural person who invokes the capacity of other companies, but that several legal or natural persons within the framework of a so-called consortium submit a tender. It is permitted to submit tenders through a consortium in this procurement.

Tenderers who intend to submit tenders in a consortium must submit in the tender a special declaration regarding all requirements set out in the section "Exclusion grounds" in the Self Declaration by Tenderer for each of the companies participating in the consortium. The qualification requirements must be met in full by the consortium.

The tenderer who submits a tender in a consortium shall, at the request of Sida, submit a copy of the consortium agreement signed by all consortium parties.

The tenderer must without delay and on request submit documentation in accordance with the section "Qualification of tenderers" in this procurement document which proves that the above requirement is met.

3.4. Qualification of tenderers

Whenever it is deemed necessary for the further processing of the tender, the Embassy may request information or evidence to verify fulfilment of the requirements set forth in the section "Requirements for tenderers" and the information submitted in Appendix 4 Self Declaration by Tenderer.

The Embassy will request the information or evidence listed below of those tenderers to whom the Embassy intends to award framework agreements:

- Evidence that the tenderer and any subcontractors on which the tenderer relies or consortium parties are not to be excluded according to Chapter 13, Section 1 of the LOU (i.e. section "A: Grounds relating to criminal convictions" in the Self Declaration by Tenderer (Appendix 4) shall primarily consist of an "extract from a criminal records database," or else an "equivalent document issued by a competent government authority". If neither of these forms of evidence can be provided, the tenderer may submit a declaration of honour "before an authorised body, or a similar declaration". Examples of such declarations are available in Appendix 5 "Declaration of honour".
- Documentation issued by a competent government authority attesting to compliance with respect to the payment of taxes and social security contributions in the home country of the tenderer and of any subcontractors on which the tenderer relies or consortium parties. If these forms of evidence can not be provided, the tenderer may submit a declaration of honour "before an authorised body, or a similar declaration". Examples of such declarations are available in Appendix 5 "Declaration of honour".
- Documentation issued by a competent government authority in the country in question supporting the claim that the tenderer and any subcontractors on which the tenderer relies, or consortium parties are not bankrupt and are not in arrangement with creditors, and that their assets are not being administered by a liquidator or by a court. If these forms of evidence can not be provided, the tenderer may submit a declaration of honour "before an authorised body, or a

similar declaration”. Examples of such declarations are available in Appendix 5 “Declaration of honour”.

- A declaration of honour as proof that the tenderer and any subcontractors on which the tenderer relies, or consortium parties have not entered into a voluntary arrangement with creditors, that their assets are not being administered by a liquidator or a court, or that they have not suspended their business activities. Examples of such declarations are available in Appendix 5 “Declaration of honour”.
- Documentation attesting to compliance with respect to registration in a register that is equivalent to the Swedish Register of Companies or trade register, or a similar register.
- Alternative proof of economic and financial position, in accordance with the section “Key Financial ratios” in the Self Declaration by Tenderer.
- Commitment in the form of a parent company guarantee, cooperation agreements, or equivalent from all subcontractors on which the tenderer relies.
- A copy of a consortium agreement, signed by all consortium parties.

The supplementary documents (information/evidence) verifying fulfilment of the requirements set forth in the section “Exclusion grounds”, i.e. p. 1–4 above, may not be more than **three months old**, as calculated from the closing date for tenders.

The following applies to all the above-mentioned documents:

The tenderer is recommended to have the documentation at hand since this information is to be submitted without delay.

If the tenderer submits information/evidence in a language other than Swedish or English, the tenderer must submit on request a translation of the original document in Swedish or English.

If the tenderer cannot submit information/evidence in accordance with the above, an explanation must be attached to this. If the explanation is considered insufficient by the Embassy, this could mean that the tenderer will be excluded from the procurement, which may have consequences for the tender as a whole.

A tenderer is under no obligation to submit supplementary documents if the Embassy has access to the information or is able to obtain access free of charge to the information by electronic means.

3.5. Consultant conflicts of interest

If the Embassy is using an external consultant for the formulation of this procurement document (or for other preparatory work prior to this procurement) and the consultant also plans to submit a tender in the procurement, improper competitive advantages may arise. A consultant who has been engaged for the formulation of this procurement document or other preparatory work may therefore be excluded from submitting a tender in this part of the procurement. It is irrelevant if the consultant was hired by the Embassy or if the consultant participated as a subconsultant.

4. Requirements for services

4.1. Subcontractors for the implementation of the assignment

The tenderer has the opportunity to hire a subcontractor/s to carry out the assignments under the framework agreement. A subcontractor is a supplier who assists the tenderer with the services covered by this procurement and which are not invoked to ensure economic, technical and professional capacity. Such suppliers who supply various goods and services to the tenderer are not either to be considered as subcontractors.

If a subcontractor (s) will be engaged for the execution of the assignments, the following information must be stated about the subcontractor (s) in the tender:

- Name
- Organization number
- Tasks that subcontractor (s) will perform

At the request of Sida, a tenderer who hires a subcontractor (s) to carry out the assignments, by means of a certificate or copy of a signed cooperation agreement, must demonstrate a cooperation relationship with the subcontractor (s) that is valid throughout the framework agreement period.

The tenderer is responsible for the subcontractor's work as for his own work. The tenderer is also responsible for the subcontractor complying with requirements, criteria and conditions in the framework agreement.

NOTE: The subcontractor (s) to be used for the performance of the requested services (ie the object of the procurement) are not to be considered as invoked companies in terms of financial, technical and professional capacity. See further under point 3.2.

4.2. Terms of reference

The terms of reference define the conditions for the implementation of the assignments. See Appendix 1 – Terms of reference.

The tenderer **shall** accept the prerequisites for the implementation of the assignment, which are presented in Appendix 1 – Terms of reference.

4.3. Organisation of call-off assignments

The tenderer **shall** submit a description of staffing for future call-off assignments. The description must include the following:

- Process of staffing for future call-off assignments, including example where several assignments for the Embassy are called for in parallel.
- The tenderer's network and co-operations that will facilitate the implementation of future assignments.

4.4. Qualifications and competence

The tenderer shall provide consultants with relevant experience who safeguard the fulfilment of the purpose and scope of the framework agreement.

Level 1 - Senior consultants shall

- have a degree from a college/university with relevance for performing assignments in the Auditing Sector or equivalent qualification,
- have at least seven (7) years of experience working in a senior position within the Auditing Sector,
- have been responsible for and/or participated in at least five (5) assignments within international development cooperation and/or similar donor funded projects/programmes during the last five (5) years, and
- have very good skills in English (written and spoken), equivalent to at least level 2 (according to the language level definition appendix); see appendix 6.

Level 2 - Junior consultants shall

- have a degree from a college/university with relevance for performing assignments in the Auditing Sector or equivalent qualification,
- have at least three (3) years of experience working within the Auditing Sector,
- have participated in at least three (3) assignments within international development cooperation and/or similar donor funded projects/programmes during the last three (3) years, and
- have very good skills in English (written and spoken), equivalent to at least level 2 (according to the language level definition appendix); see appendix 6 [insert the number of the appendix].

The tenderer shall provide no more than five (5) Level 1 consultants and no more than five (5) Level 2 consultants.

The tender shall include the CVs of the proposed Level 1 and Level 2 consultants. Each CV must include the following:

- The person's first name and surname,
- education,
- professional experience, and
- language skills.

Fulfilment of the above-mentioned competence requirements for Level 1 and Level 2 consultants shall be demonstrated in CVs of each consultant. The templates in Appendix 8 and 9 shall be used. -

4.5. Previously completed assignments

In its tender, the tenderer **shall** submit examples of completed assignments within the Auditing Sector and the types described in the Terms of Reference and this procurement document .

For each assignment, the following shall be submitted:

- Brief description of completed assignment

- Country/Region
- Time period
- Client
- Client's area of work (e.g. development cooperation)
- Names of consultants involved
- Type of partners (e.g., CSOs, governments, private actors)

4.6. Reporting and documentation

Reporting shall always be done in writing (English language) and orally upon request. Reporting shall when applicable include Management Letters with Management's Response.

4.7. Statistics

The tenderer shall, at the request of the Embassy, provide statistics regarding the use of the Framework Agreement.

The statistics shall be reported once (1) every year.

The statistics shall contain the following:

- Total amount of call-offs
- Specification of services/assignments

The tenderer shall deliver requested statistics in digital form that is readable in publicly available cell-based calculation software, such as Excel or equivalent.

5. Evaluation criteria

5.1. Organisation of call-off orders (maximum 20 points)

The assessment and scoring of the submitted description of staffing for future assignments/call-off orders will be done in accordance with the section “Evaluation of tenders.”

In the assessment, the following will be reviewed:

- How the tenderer intends to ensure the staffing for future call-off assignments (10 points).
- The tenderer’s network and co-operations that will facilitate the implementation of future assignments (10 points).

5.2. Merits (maximum 40 points)

Section 4.4 specifies the minimum requirements for proposed persons’ qualifications and competence. Whatever exceeds the minimum requirements is demonstrated below and will be assessed and scored in accordance with the section “Evaluation of tenders.”

It is **preferable** if proposed consultants have the following:

- been responsible for or participated in forensic audits and/or investigative reviews (20 points)
- have given trainings in audit related matters to clients (20 points)

5.3. Previously completed assignments (maximum 40 points)

In the assessment, the following will be reviewed:

- The experience of conducting assignments within international Development Cooperation in Zambia (20 points)
- The variety of assignments with relevance to the Terms of Reference and this procurement document (20 points)

6. Tender prices

Prices, fees and costs shall be expressed in SEK, excl. VAT, but including any other taxes and charges.

6.1. Hourly rates

The tenderer shall specify each consultant level's hourly rate below.

	Price/hour
Level 1 consultant	
Level 2 consultant	

The tender price will be price/hour Level 1 consultant + price/hour Level 2 consultant

6.2. Abnormally low tenders

If a tender appears to be abnormally low, The Embassy is obligated to request that the tenderer explain the low price or cost. If the tenderer has failed to explain the low price or cost in a satisfactory manner, The Embassy will reject the tender.

7. Evaluation of tenders

The evaluation of tenders will be carried out on the following basis:

Best price-quality ratio

7.1. Evaluation method

The evaluation will be conducted on the basis of the below award criteria:

Award criteria	Maximum score
Organisation of call-off orders	20
Merits	40
Previously completed assignments	40
Total points	100

The assessment and scoring of the award criteria will be carried out according to the following scoring scale:

The score for each criterion generates a weighted score. For example, a criterion score of 20 points that is deemed to be “Good” is assigned $0.8 \times 20 = 16$ points. (In the evaluation, the levels (in %) will be fixed. This means that no intermediate levels will be used.)	Rejected	0 %
	Inadequate	40 %
	Acceptable	60 %
	Good	80 %
	Very good	100 %

The tender must receive at least 65 points to be eligible for further evaluation.

Definition of the scoring scale:

Rejected = The description or equivalent element is missing or has major shortcomings.

Inadequate = The description or equivalent element is included but has certain shortcomings.

Acceptable = The description or equivalent element is sufficiently good but lacks substantial benefits or is of uneven quality.

Good = The description or equivalent element is adequate and well suited for the purpose.

Very good = The description or equivalent element provides added value and is of high quality overall.

The quality score is used to reward provided quality by awarding tenders a percentage mark-up on the price, wherein the mark-up is a function of how much lower the quality of the tender is judged to be in relation to the maximum quality. This method makes it possible to determine a comparative value for each tender. The winning tender is the one with the lowest comparative figure.

The following formula is used:

Comparison value = Tendered price x (1 + Percentage surcharge).

Percentage surcharge = [(maximum quality score – quality score assigned)/maximum quality score] x upward adjustment factor;

The upward adjustment factor reflects the effect the quality offered should have when added to the price in an evaluation. The higher the upward adjustment factor is, the greater the importance accorded to qualitative criteria in relation to the price. For this procurement, the weighting factor is set at [enter the weighting factor].

The upward adjustment factor in this procurement is set at 3.0.

Evaluation example:

The upward adjustment factor in the example is 2,5.

Tender A: Price of 480,000 SEK; the total quality score obtained is 90 out of 100 points.

Tender B: Price of 400,000 SEK; the total quality score obtained is 75 out of 100 points.

Evaluation, Tender A

Percentage surcharge = $(100 - 90) / 100 \times 2,5$; Percentage increase = 0.25;

Comparative figure = $480,000 \times (1 + 0.25)$; Comparative figure = 600,000.

Evaluation, Tender B

Percentage surcharge = $(100 - 75) / 100 \times 2,5$; Percentage increase = 0.625;

Comparative figure = $400,000 \times (1 + 0.625)$; Comparative figure = 650,000.

The winning tender is A, since it has the lowest comparison value.