

1. EVALUATION CRITERIA

1.1 PHASE 1 - ADMINISTRATIVE EVALUATION CRITERIA

Initial Screening Process: At this phase bidder's response are reviewed to check if bidders have responded according to CEF (SOC) Ltd RFP document.

1.2 PHASE 2 - MANDATORY EVALUATION

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement. The Mandatory Technical Requirements are as follows:

Mandatory requirements	Comply	Not comply
1.2.1 The bidder must provide three (3) relevant contactable references where they have done IAR & AFS for private companies or State Owned Entities (SoE's) within the energy sector in the past five years (2018 – 2022). The reference letter should be on the company or SoE's letterhead dated and signed.		

1.2.2 The bidder must provide three (3) samples of integrated annual reports and financials completed for private companies or State owned Entities in the energy sector (hard copies only)		

Note: Failure to comply with any of the Mandatory Requirements will lead to the bidder being disqualified, and not considered for further evaluation on Other Technical Requirements.

1.3 PHASE 3 - TECHNICAL EVALUATION

Bidders will be evaluated according to the below technical evaluation criteria. Minimum Technical Threshold is **70%**. It must be noted that if the Bidder does not meet the **70%** minimum threshold, the bidder will be disqualified and not be evaluated further.

1.3.1. BIDDER EXPERIENCE

The bidder is required to demonstrate at least 10 years relevant experience in the design, layout, editing, proofreading and printing of an IAR and AFS.

Evaluation Criteria	Document as Evidence	Score	Weighting %
10 or more years' relevant experience	Detailed relevant experience as per scope of services	5	20%
5 to 9 years' relevant experience		3	
1 to 4 years' relevant experience		1	
Less than 1 year relevant experience		0	

1.3.2. EDITING & PROOFREADING TEAM EXPERIENCE

The bidder's proposed Editing and Proofreading team must have relevant qualifications, skills and experience in proofreading and editing. Experience in editing IARs & AFS for State-Owned Companies (SOCs) will be an added advantage.

The bidder must submit, as part of its proposal, the following:

- ✓ The structure & composition of the proposed Editing and Proofreading team, clearly outlining the roles of each team member in relation to this project.
- ✓ Short profiles/cv's of all key team members highlighting qualifications and areas of expertise/experience relevant to the scope of services of proofreading & editing

NB: In the event that the bidder provides only one of the two pre-requisites, they will be scored with a one (1). The experience should be in the form of a short professional profile or a cv highlighting the qualifications and relevant experience only.

Evaluation Criteria	Document as Evidence	Score	Weighting %
Structure of editing & proofreading team with roles & professional profiles with relevant qualifications & relevant experience of an average of over 10 years	Structure of the project team & their short summaries of qualifications & experience	5	30%
Structure of editing & layout team with roles & professional profiles with relevant qualifications & relevant experience of an average of between 5 - 9 years		3	
Structure of editing & proofreading team with roles & professional profiles with relevant qualifications & relevant experience of an average of between 1 - 4 years		1	
Below one year experience or no provision of team structure, professional profiles		0	

1.3.3. DESIGN & LAYOUT TEAM EXPERIENCE

The bidder's proposed design and layout team must demonstrate a track record / experience in designing integrated reports & financial statements.

The bidder must submit, as part of its proposal, the following:

- ✓ The structure & composition of the proposed project team, clearly outlining the roles of each team member in relation to this project.
- ✓ Short professional profiles of all key team members highlighting qualifications and areas of expertise/experience relevant to the scope of services

NB: In the event that the bidder provides only one of the two pre-requisites, they will be scored with a one (1). The experience should be in the form of a short professional profile or cv highlighting the qualifications and relevant experience only.

Evaluation Criteria	Document as Evidence	Score	Weighting %
Structure of design & layout team with roles & professional profiles with relevant qualifications & relevant experience of an average of over 10 years	Structure of the project team & their short summaries of qualifications & experience	5	30%
Structure of design & layout team with roles & professional profiles with relevant qualifications & relevant experience of an average of between 5 - 9 years		3	
Structure of design & layout team with roles & professional profiles with relevant qualifications & relevant experience of an average of between 1 - 4 years		1	
Below one year experience or no provision of team structure, professional profiles		0	

1.3.4. PROJECT PLAN

The bidder must demonstrate their thorough understanding of the objectives and deliverables of this project through a high-level project plan/methodology.

The project plan/methodology should clearly state how the bidder plans to coordinate the project from design to printing with clear indications of

- ✓ key deliverables, and
- ✓ timeframes.

Evaluation Criteria	Document as Evidence	Score	Weighting %
Provision of a high-level detailed project plan with both pre-requisites	Project Plan with key deliverables & timeframes	5	20%
Provision of a high-level detailed project plan with one pre-requisite		3	
Provision of a sparse project plan not clearly indicating pre-requisites		1	
No provision of project plan		0	

1.4 PHASE 4: COMMERCIAL EVALUATION

CEF (SOC) Ltd will utilise the following formula in its evaluation of Price offers:

[Weighted score 80 points]

$$PS = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where:

Ps = Score for the Tender under consideration

Pt = Price of Tender under consideration

Pmin = Price of lowest acceptable Tender

Preference points/specific goals criteria

[Weighted score 20 points]

Specific goals / Preference Points Claim

Evaluation Criteria	Final Weighted Scores
Price	80
Specific goals	20
TOTAL SCORE:	100

A maximum of 20 points will be awarded to a tenderer for specific goals specified for the tender/RFQ as follows:

Specific goals	Points
Historically disadvantaged individual (HDI)	
Enterprises with ownership of 51% or more by person/s who are black	10
Enterprises with ownership of 51% or more by person/s who are women	5
Enterprises with ownership of 51% or more by person/s who are youth	3
Enterprise with ownership of 10% or more by person/s with disability	2
Total	20

Tenders must submit their B_BBEE certificate issued by an authorized body or person or a B-BBEE sworn affidavit to claim preference points.

- The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- The contract must be awarded to the tenderer scoring the highest points.
- If two or more tenders score an equal total number of points, the contract must be awarded to the tenderer that scored the highest points for specific goals, and if two or more tenderers score equal total points in all respects, the award must be decided by the drawing of lots.