

ANNEXURE B

EVALUATION CRITERIA

APPOINTMENT OF AN INDEPENDENT MULTI-DISCIPLINARY SERVICE PROVIDER TO DEVELOP THE PETROLEUM SECTOR DEVELOPMENT PLAN FOR SOUTH AFRICA.

EVALUATION CRITERIA

The bids shall be evaluated in three (3) phases, the Mandatory Requirements, Technical evaluation and Commercial Evaluation Criteria.

1. PHASE 1

Mandatory Requirements

At this phase, bidder's responses are reviewed against the below Mandatory Requirements. **Failure to comply with any of the Mandatory Requirements may lead to the bidder being disqualified, and not be considered for further evaluation on Technical Requirements.**

No.	Qualification and/or Professional registration for the Work Stream Lead	Comply	Not Comply
1.1	Proof of qualification.		
a)	OVERALL TEAM LEAD: Mandatory: Relevant degree in Engineering, Economics, Finance, Energy Studies, Public Policy, Business Administration.		
	Comments		

b)	TECHNICAL LEAD • Relevant Engineering, Energy and Petroleum.		
	Comments		

c)	STRATEGIC PLANNING LEAD • Relevant postgraduate qualification in Strategy, Economics, Public Policy, Energy Studies, Business Administration.		
	Comments		

2. PHASE 2

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.

3.1 BIDDERS EXPERIENCE

Evaluation Criteria	Document as Evidence	Score	Weighting %
3.1.1 EXPERIENCE OF THE COMPANY The bidder must demonstrate corporate experience in successfully completing petroleum-sector development plans, petroleum or energy masterplans, fuel-security studies, downstream infrastructure strategies, petroleum policy or regulatory reviews, or comparable national or regional energy-planning assignments. Scoring will be based only on completed assignments supported by signed reference letters. Note: the following scoring matrix will be used to evaluate this criteria:			
5 and more Reference letters	Signed reference letter for each assignment, on the client's letterhead, stating the assignment, scope, completion status, period and contactable referee details.	5	15%
4 Reference letters		4	
3 Reference letters		3	
2 Reference letters		2	
1 Reference letter		1	
No Reference letters		0	

3.2 OVERALL PROJECT LEAD

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Overall Team Lead must demonstrate leadership of multidisciplinary petroleum, energy-sector planning or comparable national infrastructure strategy assignments. The CV must identify the person's role, project scope, client, dates and outcomes. Scoring will be based on the number of qualifying projects personally led or directed. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects	Detailed CV, qualifications and a project list with contactable client references.	5	12.5%
Four qualifying projects		4	
Three qualifying projects		3	
Two qualifying projects		2	
One qualifying projects		1	
One qualifying projects		0	

3.3 METHODOLOGY/APPROACH AND PROJECT PLAN

Evaluation Criteria	Document as Evidence	Score	Weighting %
The bidder must provide an integrated methodology and project plan addressing baseline assessment and vulnerability analysis; demand forecasting and scenario modelling; policy, regulatory and institutional reform; infrastructure and investment planning; stakeholder consultation and social compacting; finalisation and approval support; quality assurance; reporting; risk management; and knowledge transfer. The project plan must show activities, dependencies, milestones, deliverables, responsibilities and realistic timelines. Note: the following scoring matrix will be used to evaluate this criteria:			
Comprehensive, PSDP-specific and fully integrated methodology and project plan addressing all requirements with credible sequencing and value-adding detail	Detailed Methodology	5	2.5%
Strong methodology and project plan addressing all requirements, with only minor gaps		4	
Adequate and workable methodology and project plan addressing the principal requirements		3	
Partially responsive methodology or project plan with material gaps		2	
Generic, weak or largely incomplete methodology and project plan		1	
No responsive methodology and project plan submitted		0	

3.4 PROJECT ORGANOGRAM AND TEAM STRUCTURE

Evaluation Criteria	Document as Evidence	Score	Weighting %
The bidder must provide a project-specific organogram showing the Overall Team Lead, all specialist leads, supporting resources, reporting lines, interfaces, allocation of responsibilities and level of effort. The structure must demonstrate integration across technical expertise, strategic planning, analytical capability, stakeholder facilitation, governance and integrity, and project management. Note: the following scoring matrix will be used to evaluate this criteria:			
Comprehensive organogram covering all required leads, reporting lines, responsibilities, interfaces and resource allocation	Project-specific organogram, responsibility matrix and resource allocation schedule.	5	10%
Organogram covers all required leads and reporting lines but contains minor gaps in responsibilities, interfaces or resource allocation		4	
Adequate organogram covering the core team, reporting lines and principal responsibilities		3	
Partial organogram with material gaps in required roles, reporting lines or responsibilities		2	
Generic or materially incomplete organogram		1	
No project organogram submitted		0	

3.5 TECHNICAL LEAD

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Technical Lead must demonstrate competence through completed projects covering petroleum markets, downstream infrastructure, fuel security, petroleum regulation and energy-transition impacts. Projects should collectively demonstrate an ability to assess refining, imports, storage, terminals, pipelines, logistics, strategic stocks and transition-fuel implications. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects.	Detailed CV, qualifications and a project list with contactable client references.	5	10%
Four qualifying projects.		4	
Three qualifying projects.		3	
Two qualifying projects.		2	
One qualifying project.		1	
No qualifying projects .		0	

3.6 STRATEGIC PLANNING LEAD

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Strategic Planning Lead must demonstrate competence through completed projects involving sector strategies, implementation roadmaps, institutional options and policy reform proposals, preferably within petroleum, energy or strategic infrastructure sectors. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects.	Detailed CV, qualifications and a project list with contactable client references.	5	10%
Four qualifying projects.		4	
Three qualifying projects.		3	
Two qualifying projects.		2	
One qualifying project.		1	
No qualifying projects .		0	

3.7 ANALYTICAL LEAD

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Analytical Lead must demonstrate competence through completed projects involving demand forecasting, scenario modelling, financial and economic analysis, infrastructure or least-cost modelling, sensitivity analysis and risk assessment. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects.	Detailed CV, qualifications and a project list with contactable client references.	5	10%
Four qualifying projects.		4	
Three qualifying projects.		3	
Two qualifying projects.		2	
One qualifying project.		1	
No qualifying projects.		0	

3.8 STAKEHOLDER FACILITATION LEAD:

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Stakeholder Facilitation Lead must demonstrate competence through completed projects involving structured engagements with government, regulators, SOEs, petroleum or energy industry participants, labour, communities or other affected stakeholders, including facilitation and consolidation of stakeholder inputs. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects.	Detailed CV, qualifications and a project list with contactable client references	5	10%
Four qualifying projects.		4	
Three qualifying projects.		3	
Two qualifying projects.		2	
One qualifying project.		1	
No qualifying projects.		0	

3.9 GOVERNANCE AND INTEGRITY LEAD:

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Governance and Integrity Lead must demonstrate competence through completed projects involving governance, institutional mandates, regulatory coordination, compliance, conflict-of-interest management, confidentiality or integrity frameworks. The resource must demonstrate independence from material conflicts of interest in the petroleum sector. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects.	Detailed CV, qualifications, project list with	5	10%
Four qualifying projects.		4	
Three qualifying projects.		3	

Two qualifying projects.	contactable client references, signed declaration of interests and proposed conflict-management measures	2	
One qualifying project.		1	
No qualifying projects.		0	

3.10 PROJECT MANAGEMENT LEAD:

Evaluation Criteria	Document as Evidence	Score	Weighting %
The proposed Project Management Lead must demonstrate competence through completed multidisciplinary projects involving structured workplans, milestone tracking, quality control, risk and issue management, formal reporting and delivery within approved timeframes. Note: the following scoring matrix will be used to evaluate this criteria:			
Five or more qualifying projects.	Detailed CV, qualifications or project-management certification, and a project list with contactable client references.	5	10%
Four qualifying projects.		4	
Three qualifying projects.		3	
Two qualifying projects.		2	
One qualifying project.		1	
No qualifying projects.		0	



ANNEXURE A:

Bidder Project Experience Schedule

Bidders must complete the schedule below. A separate signed reference letter must be attached for each company assignment claimed. The same project may be listed in an individual's CV where that individual personally participated in it.

Project and year completed	Client	Scope and relevance to PSDP	Role of bidder or proposed lead	Completion status	Contactable referee details