

ANNEXURE B

EVALUATION CRITERIA

THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF STRATEGY FACILITATION OVER THE PERIOD OF 36 MONTHS.

1. EVALUATION CRITERIA

The bids shall be evaluated as follows:

1.1 Phase 1 Technical Evaluation

Bidders will be evaluated according to the below technical evaluation criteria. Minimum Technical Threshold is 75%. It must be noted that if the Bidder does not meet the 75% minimum threshold, the bidder will be disqualified.

Evaluation Criteria	Document as Evidence	Score	Weighting %
1.1.1 BIDDER'S EXPERIENCE The bidder must demonstrate that they have proven experience in successfully completing assignments relating to Risk Management, Corporate Turnaround, Post-Merger Integration, Strategy Review Facilitation and Development of enterprise strategies/ corporate plans in the Oil, Gas & Gas-Infrastructure, Mining / Energy industries. Bidder must provide reference letters of similar and/or relevant assignments or projects completed in the past ten (10) years . The reference letters must be dated, signed and on a client's letterhead and must include contactable details.			
Bidder submitted 7 or more reference letters of completed relevant projects	Reference letters with details of past relevant projects	5	20%
Bidder submitted 4 or more reference letters of completed relevant projects		3	
Bidder submitted 3 or less reference letters of completed relevant projects		0	

Evaluation Criteria	Document as Evidence	Score	Weighting %
1.1.2 EXPERIENCE OF THE PROJECT TEAM WITH CORPORATE TURNAROUNDS The bidder must explicitly mention the specific experience in the team for turnarounds. The team should have experience in Corporate Turnaround – especially in the energy sector. Bidder must provide the following: • A proposed project organogram • CVs of each proposed support team member on the organogram. The CVs must clearly show number of years of working experience and indicate roles each team member held relevant to this CEF scope of work.			
Bidder's project team has 10 or more years average experience and has supported 4 or more relevant Turnaround projects.	Bidder's project team CV which must include a list of past relevant projects and clear years of working experience.	5	20%
Bidder's project team has 5 but less than 10 years on average experience and has supported 3 relevant Turnaround projects.		3	
Bidder's project team has 3 but less than 5 years on average experience and has supported 2 or fewer relevant Turnaround projects.		0	

Evaluation Criteria	Document as Evidence	Score	Weighting %
1.1.3 EXPERIENCE OF THE PROPOSED PROJECT LEAD Bidder's proposed project lead should have experience in the energy sector of supporting similar assignments (i.e., Risk Management, Corporate Turnaround, Post-Merger Integration, Strategy Review Facilitation, and Development of enterprise strategies/ corporate plans and supporting projects).			
Bidder's project lead has 8 years and more experience	Bidder's project lead CV which must include a list of past relevant projects and clear years of working experience.	5	20%
Bidder's project lead has ≥ 5 years but < 8 years experience		3	
Bidder's project lead has less than 5 years experience		0	

Evaluation Criteria	Document as Evidence	Score	Weighting %
1.1.4 BIDDER'S METHODOLOGY /PROJECT APPROACH Bidder must provide a written methodology and approach with indicative project timelines that the bidder will use to deliver the scope or requirements within the stipulated timelines as guided by state owned entity statutory requirements.			
Bidder's methodology is comprehensive. i.e., The proposal covers all critical aspects of the scope of work in a comprehensive manner, showcasing the bidder's deep understanding of the requirements. The proposal meets all the criteria listed in the brief. The proposed methodology is detailed and well-conceived, has made allowance for key aspects and risk areas and other value adds.	Methodology (Work packages / Deliverables)	5	15%
Bidder's methodology is less comprehensive. i.e., The proposal partially addresses critical aspects of the scope of work. While the proposal covers some important aspects of the requirements, it lacks thoroughness or depth in certain areas.		3	
Bidder's methodology is poor. The proposal does not address many of the criteria identified in the brief. The methodology is weak in important areas.		0	

Evaluation Criteria	Document as Evidence	Score	Weighting %
1.1.5 BIDDER'S DETAILED PROJECT EXECUTION PLAN The bidder must demonstrate thorough understanding of the objectives and deliverables of this assignment by providing a detailed execution plan to be utilised in delivering the assignment.			
Detailing critical path and interfaces with consideration for a detailed execution plan addressing 100% of deliverables.	Project Execution Plan	5	20%
Detailing critical path and interfaces with consideration for a detailed execution plan addressing at least 80% of deliverables.		3	
Generic execution plan adequately addressing less than 80% of deliverables .		0	

Evaluation Criteria	Document as Evidence	Score	Weighting %
1.1.6 KNOWLEDGE AND SKILLS TRANSFER PROPOSAL/ PLAN Bidder must provide in their proposal skills transfer plan for CEF project team.			
<i>Bidder's skills transfer is comprehensive.</i> i.e., Bidder's skills transfer plan clearly identifies the specific skills to be transferred, it is clear on how current skills assessment will be conducted, has clear training methods and timelines for skills transfer and allocated resources and tools/technology. Including monitoring and feedback strategies	Knowledge & Skills transfer plan	5	5%
<i>Bidder's skills transfer is less comprehensive.</i> i.e., Bidder's skills transfer plan partially addresses critical aspects stated above		3	
<i>Bidder's skills transfer is poor.</i> Bidder's skills transfer plan is weak in important areas listed above.		1	
<i>Bidder submitted no knowledge and skills transfer plan.</i>		0	

1.2 Phase 2 Technical Evaluation

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

a) **[Weighted score 80 points]**

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

Where:

Ps = Score for the Tender under consideration

Pt = Price of Tender under consideration

Pmin = Price of lowest acceptable Tender

b) **Preference points/specific goals criteria**

c) **[Weighted score 20 points]**

d) **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.



PRICE SCHEDULE

Bidders must provide an all-inclusive offer to CEF that incorporates all foreseeable costs to deliver the scope in full.

The pricing must be an activity-based cost pricing schedule which details in full what deliverables /activities will be delivered.

The costing must also include fixed disbursements estimates over the duration of the contract noting that they will be travelling to the various CEF group of companies.

DESCRIPTION	ESTIMATE DURATION / PER FY	Price Year 1	ESTIMATE DURATION / PER FY	Price Year 2	ESTIMATE DURATION / PER FY	Price Year 3
Strategy Review for CEF SOC Board		R		R		R
Strategy Review for CEF SOC EXCO		R		R		R
Strategy Review for SA NPC		R		R		R
Strategy Review for PASA		R		R		R
Strategy Review for SFF		R		R		R
Strategy Review for AEMFC		R		R		R
Strategy Review for PETROSA		R		R		R
SPECIFIC GUIDANCE FOR SA NPC REFINERY		R		R		R
SPECIFIC GUIDANCE FOR EPD		R		R		R
SPECIFIC GUIDANCE FOR CEF CARBON		R		R		R
DISBURSEMENTS		R		R		R
TOTAL OFFER TO CEF (EXC. VAT)		R		R		R
VAT (@15%)		R		R		R
Grand Total Offer To CEF for three (3) years (INC. VAT)		R				

NB: this template serves as a guide and bidders must edit the table to include their full costing and provide a fixed activity-based cost /offer to CEF.