

**Man-Portable Surveillance and Target Acquisition Radar (MSTAR)
Obsolescence Replacement Programme (ORP)
Evaluation Methodology**

1. Introduction

- 1.1 This document sets out the evaluation process and criteria that the Authority will use to evaluate the MSTAR ORP Tenders. The objective of the evaluation is to determine the Most Economically Advantageous Tender (MEAT) for the purpose of recommending an award of Contract by the Authority.
- 1.2 The process and criteria by which the Authority will evaluate the MSTAR ORP Tenders are set out in this document. The objective of evaluation is to determine the MEAT.

2. Outline of the Tender Evaluation Process

- 2.1 Tenders **must** be submitted in hard copy, soft copy, and via the AWARD® data-room portal in accordance with DEFFORM 47 section E.
- 2.2 Evaluation of Tenders is subject to moderation and falls into two functional areas: Commercial and Performance.
- 2.3 The Evaluation comprises of one process containing five stages:
- (i) Commercial Compliance Evaluation (Stage 1)
 - (ii) Performance Compliance Evaluation (Stage 2)
 - (iii) Performance (Technical and Support) Confidence Evaluation (Stage 3)
 - (iv) Cost Evaluation (Stage 4)
 - (v) MEAT Scoring (Stage 5)
- 2.4 All Tenders will be evaluated in Stage 1 and only those that are found to be Commercially Compliant at Stage 1 will qualify to be evaluated at Stage 2. Tenders that do not qualify at Stage 1 will be excluded from further consideration.
- 2.5 Tenders that are found to be Compliant in Stage 1 will be evaluated at Stage 2 and only those that are found to be Compliant at Stage 2 will qualify for evaluation at Stages 3 to 5. Tenders that do not qualify at Stage 2 will be excluded from further consideration.
- 2.6 In the event that two or more Tenders have the same MEAT score, the Tender with the lowest cost in accordance with Section 7 of this document will be the MEAT.

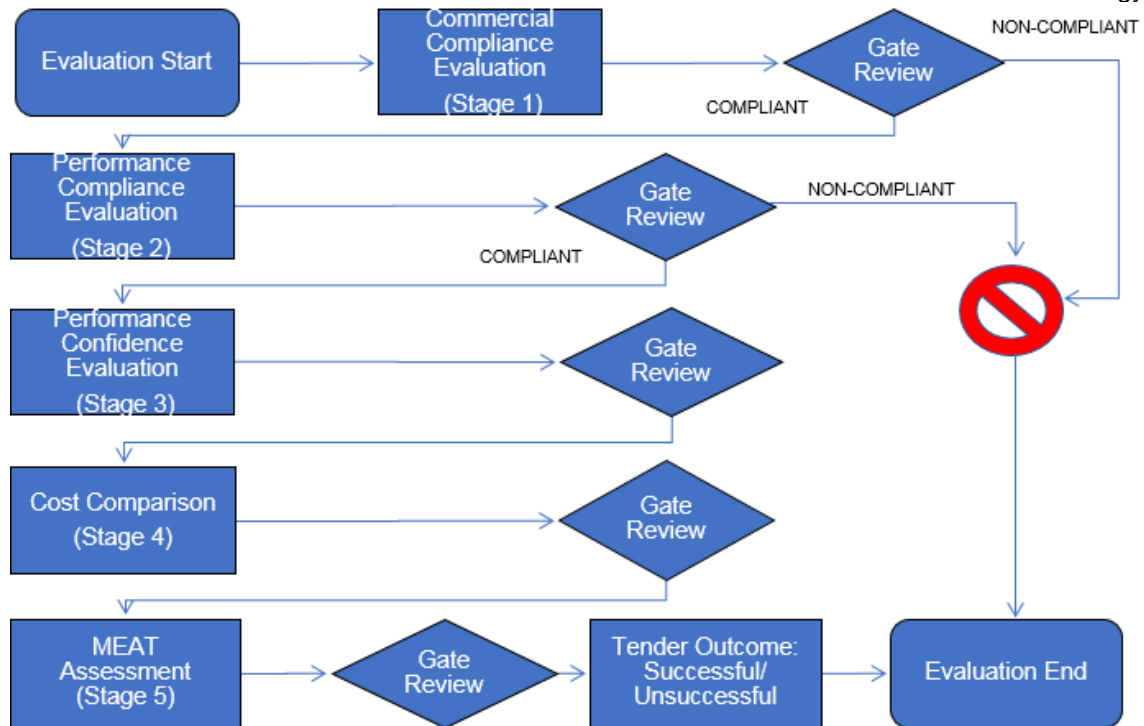
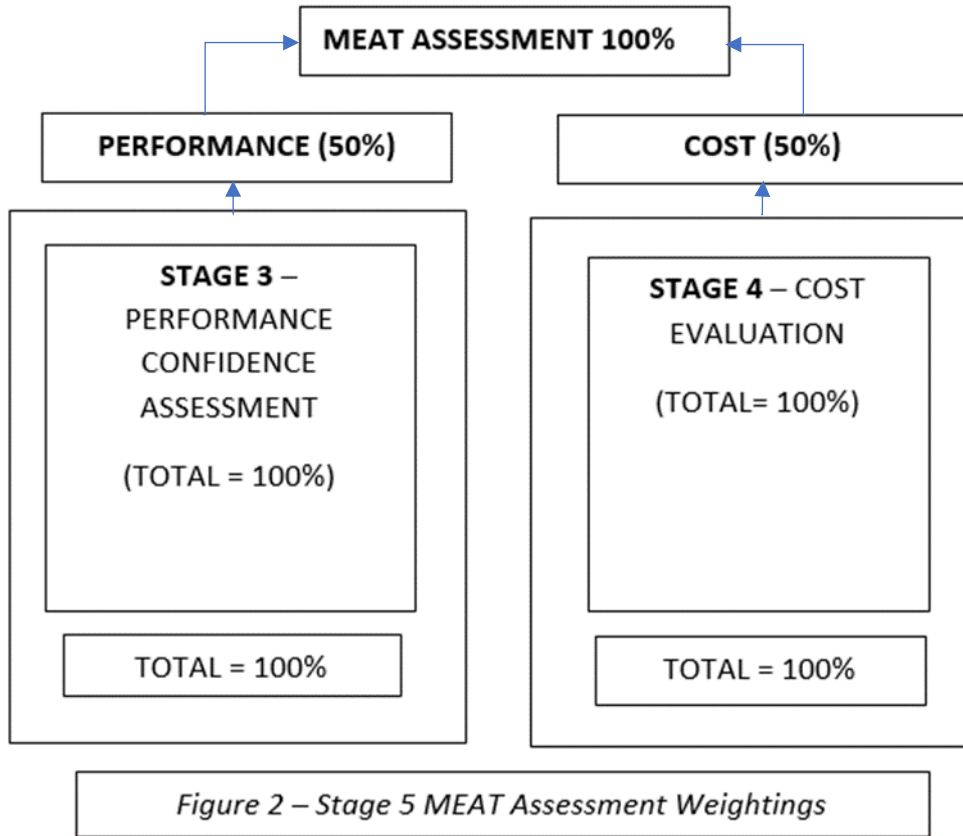


Figure 1: Tender Evaluation process

- 2.7 Figure 1 outlines the Tender Evaluation process showing the sequence for the evaluation of Stages 1 to 5.
- 2.8 The Gate Review will enable SMEs to review the Stage activity and confirm, in the form of Minutes from the Gate Review, the outcome of the Stage and that the evaluation has been carried out in accordance with the published Evaluation Methodology, following recommendation from the Lead Evaluator.
- 2.9 The red 'No Entry' symbol after Stage 1 and Stage 2 Gate Reviews represents that the Tender has been deemed Non-Compliant and will not be evaluated further.
- 3. Evaluation Stages**
- 3.1 The Authority will appoint Evaluation Teams consisting of a minimum of two individuals, who are SMEs in their respective fields to undertake the Commercial and Performance Evaluations.
- 3.2 A Lead Evaluator will be appointed from each team of SMEs who will be responsible for moderating the individual evaluations to determine a consolidated result for each area of evaluation.
- 3.3 The Commercial Compliance Evaluation at Stage 1 will result in the Tenders being deemed as 'Compliant' or 'Non-Compliant' at the end of each Gate Review, as shown in Figure 1. Tenders that achieve compliance will progress to Stage 2.
- 3.4 The Performance Compliance Evaluation at Stage 2 will be evaluated on a Compliant / Non-Compliant basis against the Mandatory and Key System Requirements (KSRs) detailed in the Contractor's Validation and Verification Requirement Matrix (VVRM). Tenders that achieve compliance will progress to Stage 3.
- 3.5 Stage 3, Performance Confidence Evaluation (Technical and Support), will be evaluated against the confidence assessed areas which are described in Section 6 of this document.

- 3.6 In Stage 4, a Cost Evaluation will be conducted for each Compliant Tender. The Cost Evaluation will be completed from the information provided in the Tender, as set out in Section 7 of this document.



- 3.7 In Stage 5, the Performance Evaluations that received confidence evaluations at Stage 3 will be converted into scores, as set out in Section 8 of this document. Each Tender's Performance Score will be combined with the associated Cost Score generated from Stage 4, subject to the weighting scheme shown in Figure 2 above, to calculate an overall MEAT score for the Tender as detailed in Section 8.

4. STAGE 1: Commercial Compliance Evaluation

- 4.1 The Commercial Evaluation will be made using the criteria set out in Table 1 below:

Table 1 – Commercial Compliance Evaluation

Compliance Evaluation	Evaluation Criteria	Outcome
Compliant (Pass)	The Tenderer has accepted all of the Authority's Terms and Conditions and Commercial Requirements contained in Appendix 2 to DEFFORM 47.	Tender qualifies to pass to Stage 2
Non-Compliant (Fail)	The Tenderer has not accepted all the Authority's Terms and Conditions, Commercial Requirements contained in Appendix 2 to DEFFORM 47, or	Tender excluded

	the Tenderer has proposed departures or restrictions.	
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- 4.2 Tenderers are required to populate the Commercial Compliance Matrix (DEFFORM 47 Appendix 2). The Commercial Compliance Evaluation will consist of a review of the Tender's compliance to the Terms and Conditions within the ITT. Evaluation of this will result in compliance or non-compliance with no mark attached. The Authority reserves the right to exclude any Tender showing non-compliance.
- 4.3 Tenders that are not Compliant at Stage 1 will be excluded from further consideration.

5. STAGE 2: Performance Compliance Evaluation

- 5.1 The Performance Evaluation Team of SMEs will complete a Performance Compliance Evaluation of the Tender against the compliance stated by the Tenderer on the Performance Compliance Matrix (DEFFORM 47 Appendix 3).
- 5.2 The Performance Compliance Evaluation will be completed against the Mandatory and Key System Requirements as detailed in the Cardinal Point Requirement Document (CPRD).
- 5.3 The criteria used for Performance Compliance Evaluation is detailed in Table 2 below:

Table 2 –Performance Compliance Evaluation

Compliance Evaluation	Evaluation Criteria	Outcome
Compliant	Tenderer claimed compliance against all areas of Performance Compliance Matrix	Tender qualifies to pass to Stage 3
Non-Compliant	Tenderer did not claim compliance against all areas of Performance Compliance Matrix	Tender excluded

- 5.4 Tenderers will be required to populate the Performance Compliance Matrix (DEFFORM 47 Appendix 3) issued as part of the Invitation to Tender documentation. Tenderers will be required to populate the Matrix stating compliance to all Performance Compliance criteria.
- 5.5 Tenderers that do not claim compliance in all areas of the Performance Compliance Evaluation will be excluded from further consideration.
- 5.6 Tenderers that claim full compliance in all areas of the Performance Compliance Evaluation will qualify for the Performance Confidence Evaluation detailed at Stage 3.

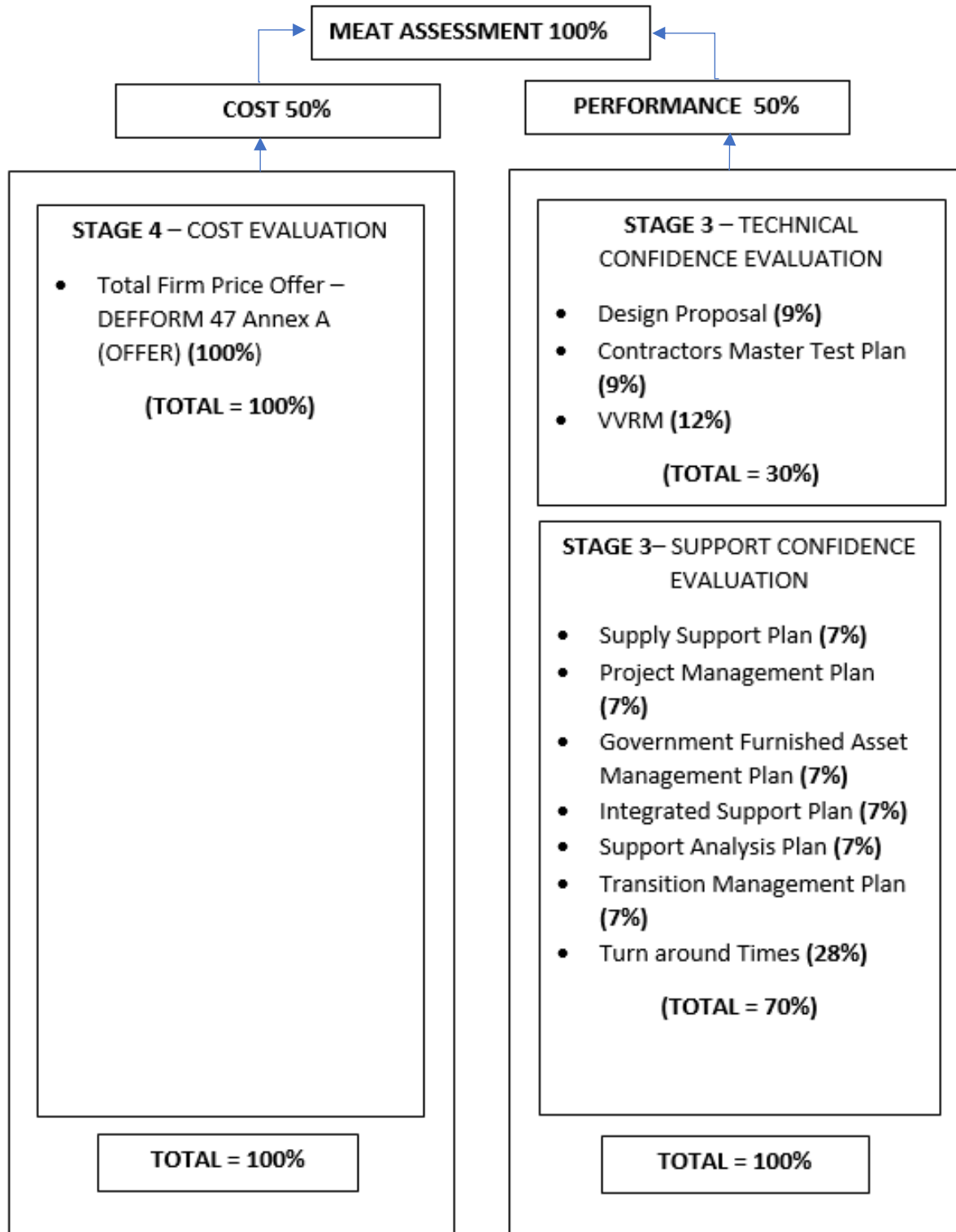


Figure 3 – Stage 5 MEAT Assessment Weightings

6. STAGE 3 – Performance (Technical and Support) Confidence Evaluation

- 6.1 The performance areas as detailed in Table 3 will be subject to an evaluation of confidence in the evidence provided to support specific areas of claimed performance compliance.

Table 3 – Performance Areas and Weightings

Performance Topic	Performance Area
Technical Confidence Evaluation (30%)	Design Proposal (9%)
	Contractor's Master Test Plan (9%)
	Validation and Verification Requirement Matrix (12%)
Support Confidence Evaluation (70%)	Supply Support Plan (7%)
	Project Management Plan (7%)
	Government Furnished Asset Management Plan (7%)
	Integrated Support Plan (7%)
	Support Analysis Plan (7%)
	Transition Management Plan (7%)
	Repair Turnaround Time (28%)

- 6.2 The Performance Evaluation Team of SMEs will consider the evidence provided in the Tender under each Performance Area detailed in Table 3 above. The Performance Confidence Evaluation will result in a series of Confidence Scores, as detailed in Tables 4 and 5 below.
- 6.3 The Contractor's proposed Repair Turnaround Time (TAT) will be evaluated using the scoring scale as shown in Table 4.

Table 4 – Repair Turnaround Time Evaluation Score

Criteria Score	Description
3.0	TAT is ≤ 10 calendar days
2.5	10 days < TAT ≤ 44 days
2.0	44 days < TAT ≤ 78 days
1.5	78 days < TAT ≤ 112 days
1.0	112 days < TAT ≤ 146 days
0.5	146 days < TAT ≤ 180 days
0	TAT is > 180 calendar days

Table 5 – Performance Confidence Evaluation Score

Confidence Evaluation Score	Description
3	The Tenderer's approach/justification/evidence to this Performance Area, when considered against the confidence characteristics at Appendix 4 to DEFFORM 47 Annex B, results in the Authority's assessment of risk to be low as the Tenderer has demonstrated that they are highly likely to achieve the aims and objectives sought in this area, as defined in the Plans and Reports at Annex C and Data Item Descriptions at Annex B to the Contract.
2	The Tenderer's approach/justification/evidence to this Performance Area, when considered against the confidence characteristics at Appendix 4 to DEFFORM 47 Annex B, contains some minor omissions and results in the Authority's assessment of risk to be medium as the Tenderer has demonstrated that they are likely to achieve the aims and objectives sought in this area, as defined in the Plans and Reports at Annex C and Data Item Descriptions at Annex B to the Contract.
1	The Tenderer's approach/justification/evidence to this Performance Area, when considered against the confidence characteristics at Appendix 4 to DEFFORM 47 Annex B, contains some significant omissions and results in the Authority's assessment of risk to be high as the Tenderer has demonstrated that it is unlikely to achieve the aims and objectives sought in this area, as defined in the Plans and Reports at Annex C and Data Item Descriptions at Annex B to the Contract.
0	The Tenderer's approach/justification/evidence to this Performance Area, when considered against the confidence characteristics at Appendix 4 to DEFFORM 47 Annex B, contains some major omissions and results in the Authority's assessment of risk to be very high as the Tenderer has demonstrated either a lack of understanding or a reluctance to fully meet/deliver the aims and objectives sought in this area, as defined in the Plans and Reports at Annex C and Data Item Descriptions at Annex B to the Contract.

- 6.4 The Performance Confidence Evaluation criteria to be used by the Performance Evaluation Team are defined at DEFFORM 47 Annex B , Appendix 4.

7. STAGE 4: Cost Evaluation

- 7.1 For Stage 4, the Total Price for Schedule of Requirements Table 1 - Requirements and Table 2 - Options stated at Annex A to the DEFFORM 47 will be used to calculate a Cost Score. This score will then be used as part of the MEAT Assessment.
- 7.2 The calculation to be used to determine the Cost Score is provided below as an example for illustrative purposes only, with the outcome for each Example Tenderer displayed in Table 6:

Cost Score

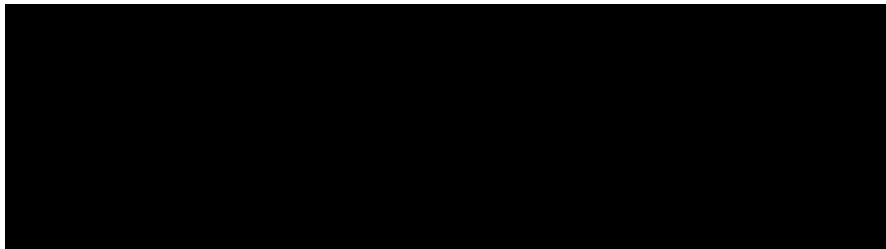
$$= \text{Total Available Score (100\%)} \times \frac{\text{Lowest Priced Compliant Tender}}{\text{(Tender Value)}}$$

$$= 100\% \times \text{[REDACTED]}$$

$$= 100\% \times \text{[REDACTED]}$$

$$= 80\%$$

Table 6 – Cost Evaluation Worked Example


8. STAGE 5: MEAT Scoring and Assessment

- 8.1 The evaluation of the MEAT will be made by using the Weighted Confidence Scores from Stage 3 as the Performance Score, and combining that with the Cost Score calculated from the Cost Evaluation in Stage 4.
- 8.2 The Confidence Scores for all Performance Areas are multiplied by the relevant individual weighting for the Performance Area shown in Table 3 to generate Weighted Confidence Scores as shown in Table 7 (to two decimal places), for example:
- 8.2.1 A Confidence Score of (3/3) for 'Design Proposal' will generate a Weighted Confidence Score of (3/3) x 9% = 9%.
 - 8.2.2 A Confidence Score of (2/3) for 'Contractor's Master Test Plan' will generate a Weighted Confidence Score of (2/3) x 9% = 6%.
 - 8.2.3 A Confidence Score of (1/3) for the 'VVRM' will generate a Weighted Confidence Score of (1/3) x 12% = 4%.
 - 8.2.4 A Confidence Score of (0/3) for the 'Project Management Plan' will generate a Weighted Confidence Score of (0/3) X 7% = 0%.

Table 7 – Performance Confidence Evaluation Worked Example

Performance Topic	Performance Area	Maximum Possible Score		Tenderer 1		Tenderer 2	
		Confidence Score out of 3	Weighted Confidence Score	Confidence Score out of 3	Weighted Confidence Score	Confidence Score out of 3	Weighted Confidence Score
Technical Assessment (30%)	Design Proposal (9%)	3	9.00%	2	6.00%	3	9.00%
	Contractor's Master Test Plan (9%)	3	9.00%	3	9.00%	1	3.00%
	Validation and Verification Requirement Matrix (12%)	3	12.00%	2	8.00%	2	8.00%
Support Assessment (70%)	Supply Support Plan (7%)	3	7.00%	2	4.67%	3	7.00%
	Project Management Plan (7%)	3	7.00%	1	2.33%	3	7.00%
	Government Furnished Asset Management Plan (7%)	3	7.00%	2	4.67%	2	4.67%
	Integrated Support Plan (7%)	3	7.00%	3	7.00%	2	4.67%
	Support Analysis Plan (7%)	3	7.00%	3	7.00%	3	7.00%
	Transition Management Plan (7%)	3	7.00%	2	4.67%	3	7.00%
	Repair Turnaround Time (28%)	3	28.00%	2	18.67%	2	18.67%
Total Performance Score		100.00%		72.00%		76.00%	

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Annex B to DEFFORM 47
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- 8.3 The sum of the Weighted Confidence Scores is calculated to generate the Total Performance Score (out of 100%). This is then multiplied by the individual weighting for the Performance Evaluation, as shown in Figure 2 (50%), to yield the Weighted Performance Score, as shown in Table 8. For example, in accordance with the example for Tenderer 1 at Table 7:

$$= 50\% \times 72.00 = 36.00\% \text{ (Weighted Performance Score)}$$

- 8.4 The Cost Score from the Cost Evaluation (Stage 4) is multiplied by the relevant individual weighting for the Cost, as shown in Figure 2 (50%), to yield the Weighted Cost Score, as shown in Table 8. For example, in accordance with item 6.2:

$$= 50\% \times 80.00 = 40.00\% \text{ (Weighted Cost Score)}$$

- 8.5 The Weighted Performance Score and the Weighted Cost Score will be added together to determine the Total Weighted Score, as shown in Figure 3 and Table 8 below.
- 8.6 The Tender with the highest Total Weighted Score will be deemed to be the Most Economically Advantageous Tender. In the event that two or more Tenders have the same Total Weighted Score, the Tender that produces the lowest Cost Score will be deemed to be the Most Economically Advantageous Tender.

Table 8 – MEAT Assessment Worked Example

	Example Score Tenderer 1	Example Score Tenderer 2
Total Performance Score	72.00%	76.00%
Weighted Performance Score	36.00%	38.00%
Cost Score	80.00%	100.00%
Weighted Cost Score	40.00%	50.00%
Total Weighted Score	76.00%	88.00%
Outcome	Unsuccessful	MEAT