

**INDICATORS UNDER THE AWARD CRITERION  
and  
COMPLEX ASSESSMENT METHODOLOGY**

This Methodology contains precise instructions for the assessment of each indicator/sub-indicator and for determining the complex assessment of the admitted Tenders, including the relative weighting of each indicator for selecting the most economically advantageous tender in accordance with the "optimal ratio quality/price" criterion.

Tenders which do not comply with the predetermined conditions of the Contracting entity and with the regulatory requirements shall not be assessed and will be excluded from the Procedure.

The most economically advantageous tender is the Tender with the highest Complex assessment (CA) score.

**1. Complex assessment**

1.1. The complex assessment (CA) of the Tenders shall be evaluated on the basis of the following indicators:

Indicator (title and indication)	Maximum number of points	Relative weighting in the complex assessment
1. "Technical parameters regarding quality of the implementation" - I1	100	30 %
2. "Price components" - I2	100	70 %

1.2. The complex assessment of the Tender of each Participant shall be calculated in accordance with the following formula:

$CA_n = EI1_n \times 30 \% + EI2_n \times 70 \%$ , where:

- $CA_n$  represents the final complex assessment of the Tender of the  $n^{th}$  Participant;
- $EI1_n$  represents the assessment of the Tender of the  $n^{th}$  Participant under indicator **I1**;
- $EI2_n$  represents the assessment of the Tender of the  $n^{th}$  Participant under indicator **I2**.

1.3. The maximum number of points which a Tender may receive is 100.

**2. Assessment under the different indicators:**

**2.1. Indicator "Technical parameters regarding quality of the implementation" (I1)**

2.2.1. The assessment under indicator I1 constitutes an assessment of the proposal of the Participant for performing the activities within the scope of the Public procurement in view of its specifics, the requirements of the Contracting entity and the relevant legal framework.

2.2.2. The maximum number of points under indicator I1 is 100 points. The relative weighting of the indicator in the complex assessment is 30 %.

2.2.3. The assessment under indicator I1 shall be determined on the basis of the sub-indicators specified in Table 1.

**Table 1**

No	Sub-indicator	Symbolic indication	Description	Number of points	Level of quality
	1.	2.	3.	4.	5.
1.	Engineering services	ENG	Subject to assessment is the quality level of Participant's proposal for performance of the activities related to the preparation of the detailed design in accordance with the requirements of the Contracting entity concerning: <ul style="list-style-type: none"> <li>- Organization of the engineering process and of the personnel responsible therefor (for each part of the Detailed design) – structure, allocation of tasks and responsibilities, competence;</li> <li>- The overall detailed designing process;</li> <li>- Schedule of the activities which the Participant intends to perform in regard to compensation for crop loss, rights of way, updating permits and other documents necessary for the lawful</li> </ul>	30	The proposal contains all 6 advantages indicated in item 1, column "Advantages" of Table 2.
				25	The proposal contains 5 of the advantages indicated in item 1, column "Advantages" of Table 2.
				20	The proposal contains 4 of the advantages indicated in item 1, column "Advantages" of Table 2.
				15	The proposal contains 3 of the advantages indicated in item 1, column "Advantages" of Table 2.

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			<p>construction, as well as for obtaining new documents, if necessary;</p> <ul style="list-style-type: none"> <li>- Measures for health and safety working conditions and environmental protection (HSE), including fire protection, and the relevant procedures and organization in accordance with the subject of the Public procurement;</li> <li>- Other, at the discretion of the Participant.</li> </ul>	10	The proposal contains 2 of the advantages indicated in item 1, column "Advantages" of Table 2.
				5	The proposal contains 1 of the advantages indicated in item 1, column "Advantages" of Table 2.
				0	The proposal repeats the requirements of the Technical specification as part of the Documentation for participation and of Project's Technical documentation, and formally meets the requirements of the Contracting entity by including description of the activities.
2.	Strategy for procurement of materials and equipment. Logistics	SPMEL	<p>Subject to assessment is the quality level of Participant's proposal for performance of the activities related to the logistics and procurement of materials and equipment in accordance with the requirements of the Contracting entity concerning:</p> <ul style="list-style-type: none"> <li>- Procurement of long lead equipment and additional materials for the construction;</li> <li>- Logistic plans for transportation and storage;</li> <li>- Temporary storage warehouses;</li> <li>- Transportation of pipes and equipment to the construction sites;</li> <li>- Structure and organization of the personnel responsible for the logistics and the implementation of the strategy for procurement of materials and equipment, distribution of the technical resources;</li> <li>- Inspection and testing procedures regarding the materials and equipment to be supplied;</li> </ul>	15	The proposal contains all 5 advantages indicated in item 2, column "Advantages" of Table 2.
				12	The proposal contains 4 of the advantages indicated in item 2, column "Advantages" of Table 2.
				9	The proposal contains 3 of the advantages indicated in item 2, column "Advantages" of Table 2.
				6	The proposal contains 2 of the advantages indicated in item 2, column "Advantages" of Table 2.
				3	The proposal contains 1 of the advantages indicated in item 2, column "Advantages" of Table 2.

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			<ul style="list-style-type: none"> <li>- Strategy for selection of suppliers;</li> <li>- Other, at the discretion of the Participant.</li> </ul>	0	The proposal repeats the requirements of the Technical specification as part of the Documentation for participation and of Project's Technical documentation, and formally meets the requirements of the Contracting entity by providing a description of the activities.
3.	Construction method statement and execution plan	CMSEP	<p>Subject to assessment is the quality level of Participant's proposal for performance of the activities related to the construction method and execution plan in accordance with the requirements of the Contracting entity concerning:</p> <p>A) Preparatory work (mobilization)</p> <p>The description of the process of preparation for the construction and of the mobilization of machinery, key experts and personnel involved in the construction shall contain at least:</p> <ul style="list-style-type: none"> <li>- Erection of camps, stock-piling management of the pipes;</li> <li>- Organization chart including the personnel involved in the construction;</li> <li>- Preparation of the construction strip and sites, temporary roads, etc.;</li> <li>- Key experts – description of tasks and responsibilities, etc.;</li> <li>- Plans for implementation of measures for environmental protection and safe labor conditions;</li> <li>- Other activities at the discretion of the Participant.</li> </ul> <p>B) Execution of the construction</p> <ul style="list-style-type: none"> <li>- Description of the types of machinery, aggregates, welding machines, etc., which will</li> </ul>	50	The proposal contains all 8 advantages indicated in item 3, column "Advantages of Table 2.
				35	The proposal contains 7 of the advantages indicated in item 3, column "Advantages" of Table 2.
				30	The proposal contains 6 of the advantages indicated in item 3, column "Advantages" of Table 2.
				25	The proposal contains 5 of the advantages indicated in item 3, column "Advantages" of Table 2.

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			<p>be used by the Participant, as well as information on their main technical parameters.</p> <p>- Description of the following activities:</p> <ul style="list-style-type: none"> <li>• Excavation;</li> <li>• Stringing and welding;</li> <li>• Coating;</li> <li>• Horizontal Directional Drilling (HDD);</li> <li>• Laying of pipes and optic cable network;</li> <li>• Backfilling;</li> <li>• Cathodic protection;</li> <li>• Construction works relating to the stations (Launching and receiving pigging stations, Automated Gas Regulating Stations, Gas Metering Stations, Block Valves Stations, Dispatching Center and Operation and Maintenance base), including structures, water and sewerage, electricity supply, etc. (where applicable);</li> <li>• Installation of equipment, including management, control and telecommunication systems;</li> <li>• Restoration of the construction strip;</li> <li>• Re-cultivation;</li> <li>• Other activities at the discretion of the Participant.</li> </ul> <p>C) Inspection, testing and quality control performed by certified bodies (for the welds, the coatings, cathodic protection system, electrical appliances and equipment up to 1000 V, blasting works, etc.):</p> <ul style="list-style-type: none"> <li>- Welded joints inspection and testing;</li> <li>- Coating inspection and testing;</li> <li>- Hardness and density testing;</li> <li>- Other activities at the discretion of the</li> </ul>	20	The proposal contains 4 of the advantages indicated in item 3, column "Advantages" of Table 2.
				15	The proposal contains 3 of the advantages indicated in item 3, column "Advantages" of Table 2.
				10	The proposal contains 2 of the advantages indicated in item 3, column "Advantages" of Table 2.
				5	The proposal contains 1 of the advantages indicated in item 3, column "Advantages" of Table 2.
				0	The proposal repeats the requirements of the Technical specification as part of the Documentation for participation and of Project's Technical documentation, and formally meets the requirements of the Contracting entity by providing a description of the activities.

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			<p>Participant.</p> <p>D) Pre-commissioning and commissioning:</p> <ul style="list-style-type: none"> <li>- Equipment testing and safety systems checks;</li> <li>- Equipment functionality and safety tests;</li> <li>- 72 hours test run (for the Bulgarian part of the pipeline), as well as all other required tests (in the whole system);</li> <li>- Other activities at the discretion of the Participant.</li> </ul>		
4.	Organization chart and personnel training program	STEP	<p>Subject to assessment is the quality level of Participant's proposal for performance of the activities related to the organization and training of the personnel for exploitation of the Gas pipeline in accordance with the requirements of the Contracting entity concerning:</p> <ul style="list-style-type: none"> <li>- Organization chart containing as a minimum a proposal for the structure, number and functions of the personnel trained for the operation of the gas pipeline;</li> <li>- Plan for the training which shall contain at least: <ul style="list-style-type: none"> <li>• Methods, resources, schedules and locations for trainings as per the Technical specification;</li> <li>• Training program, number of hours and training form;</li> <li>• Number of lecturers and their qualification;</li> <li>• Practical training prior to, during and after the commissioning of the construction, as well as participation of the training staff during the initial exploitation stage (6 months after the commissioning);</li> </ul> </li> </ul>	5	The proposal contains all 2 advantages indicated in item 4, column "Advantages" of Table 2.
				2	The proposal contains 1 of the advantages indicated in item 4, column "Advantages" of Table 2.
				0	The proposal repeats the requirements of the Technical specification as part of the Documentation for participation and of Project's Technical documentation, and formally meets the requirements of the Contracting entity by providing a description of the activities.

			<ul style="list-style-type: none"> <li>Other activities at the discretion of the Participant.</li> </ul>		
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**2.2.4.** For the purpose of assessing the quality level under sub-indicators ENG, SP MEL, CMSEP and STEP Table 2 specifies the technical advantages which could be included in the Technical offers of the Participants and are connected with quality indicators, organization of the work and execution method. The specific number of points shall be determined on the basis of an expert assessment of the Technical offer conducted by the Commission.

**Table 2**

No	Sub-indicator	Advantages
1.	2.	3.
1.	Engineering services (ENG)	<ol style="list-style-type: none"> <li>The Technical offer demonstrates the approach for performance of the activities, the specific tasks and steps in their sequence, coordination and mutual interdependence, including in regard to updating/obtaining of new permits and other documents which are necessary for the lawful construction. It is justified how the proposed approach reflects the specifics of the Technical documentation (Detailed design and FEED) and in what way it will result in the qualitative and timely completion of the Public procurement.</li> <li>The Technical offer provides a description of the distribution of tasks and responsibilities of the different experts, accompanied by arguments for its effectiveness and applicability for the purpose of improving the quality of the performance.</li> <li>The Technical offer describes the measures for health and safety working conditions and environmental protection (HSE), including fire protection, and the relevant procedures and organization in accordance with the subject of the Public procurement. It is justified how these will contribute to the protection of the life and health of the personnel of the Participant, the Contracting entity and third parties, as well as to the protection of the environment. The Technical offer reasons the effectiveness and applicability of the measures to the subject of the Public procurement.</li> </ol>

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		<p>4) The Technical offer provides adequate management of the activities for preparation of the detailed design and proposals for quality assurance, compliance with deadlines, reporting of risks and problems, execution of corrective actions, which are part of the Quality management system specified for/adapted to the Public procurement.</p> <p>5) The Technical offer provides measures/activities for communication between all participants in the Project – the Contractor, the Contracting entity and third parties (interested persons, competent authorities, supplier of pipes DN 800) and contains a reasoned analysis as to how the proposal contributes to a better coordination.</p> <p>6) The terms for completion of the separate activities, including for consulting with the Contract entity or third parties, are consistent with the period for completion of the Public procurement.</p>
2.	Strategy for procurement of materials and equipment. Logistics (SPMEL)	<p>1) The Technical offer demonstrates the approach for execution of the activities, the specific tasks and steps in their sequence, coordination and mutual interdependence. The described interdependence of the terms for manufacture and procurement of materials and equipment is consistent with the manufacture and logistic good practices, as well as with the Project specifics. It justifies how the proposed approach for execution will lead to the qualitative and timely completion of the Public procurement.</p> <p>2) The Technical offer contains description of the technical means and warehouses which the Participant intends to use, as well as of the distribution of the tasks and responsibilities of the personnel, accompanied by arguments for their effectiveness and applicability for the purpose of improving the quality of the performance.</p> <p>3) The Technical offer provides a logistic plan describing management activities, tracing of the deliveries, delivery terms, acceptance procedures, control, testing and inspection of the deliveries, including those performed by the Contracting entity, and delay compensation. The plan guarantees that the necessary quality procedures will be followed and that there will be no delay in the execution of the construction.</p> <p>4) The Technical offer presents measures/activities for communication between the participants in the Project – the Contractor, the Contracting entity and third parties (interested persons, competent authorities, supplier of pipes DN 800) and contains a reasoned analysis as to how the proposed contributes to a better coordination.</p> <p>5) The terms for completion of the separate activities, including for consulting with the Contract entity or third parties, are consistent with the period for completion of the Public procurement.</p>
3.	Construction method statement and execution plan (CMSEP)	<p>1) The Technical offer describes and provides in the form of linear calendar schedule the approach for execution of the activities, the specific tasks and steps in their sequence, coordination and mutual interdependence which are in conformity with the features of the Technical documentation and the technical solutions for execution. It explains how the proposed approach for execution will lead to</p>



		<p>the qualitative and timely completion of the Public procurement.</p> <p>2) The Technical offer contains other activities to be executed during the construction process (<i>in connection with field explorations, interaction with funding institutions, compensating owners, permits, etc.</i>), whereas the Participant has identified and justified how these lateral activities, the interaction with interested persons and the implementation of the procedures which have not been included in the Technical specification could be related to the qualitative and timely commissioning of the object.</p> <p>3) The Technical offer contains description of the allocation of the tasks and responsibilities of the team members which is adequately reflected also in a work breakdown structure (WBS). The Technical offer justifies the effectiveness and applicability of the allocation for the purpose of improving the quality of the performance.</p> <p>4) The Technical offer describes the technical means – type of equipment, software, etc., which the Participant intends to use, and justifies the impact of the selected technical means on the quality of the performance.</p> <p>5) The Technical offer provides adequate management of the activities for preparation of the detailed design and proposals for quality assurance, compliance with deadlines, reporting of risks and problems, execution of corrective actions which are part of the Quality management system specified/adapted to the Public procurement.</p> <p>6) The Technical offer provides measures/activities for communication between all participants in the Project – the Contractor, the Contracting entity and third parties (interested persons, competent authorities, supplier of pipes DN 800) and contains a reasoned analysis as to how the proposal contributes to a better coordination.</p> <p>7) The Technical offer contains additional activities in connection with the contract management process which the Participant has identified as necessary for the construction process. The Participant has justified the contribution of the proposed additional activities to the improvement of the performance quality.</p> <p>8) The terms for completion of the separate activities, including for consulting with the Contract entity or third parties, are consistent with the period for completion of the Public procurement.</p>
4.	Organization chart and personnel training program (STEP)	<p>1) The Technical offer contains justification of the structure, number and functions of the personnel trained for operation of the gas pipeline which takes into account and analyses the impact of factors such as level of automatization of the operations, need for maintenance and execution of organizational and administrative functions.</p> <p>2) The Participant describes the expected results from the implementation of the proposed training program and justifies how it will grant an opportunity for the personnel to acquire theoretical</p>

		knowledge and practical skills necessary for the safe and technically competent operation of the Gas pipeline.
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For the purpose of this Methodology the terms used herein shall have the following meaning:

**"justified/reasoned"** means an explanation of the applicability of the proposed approaches/activities/measures for improving the performance quality substantiated with facts;

**"effectiveness"** means the achievement by means of a certain approach/method/action of the aimed result in accordance with the requirements of the Contracting entity or stemming from the legislation, of the specific parameters of the procurement indicated in the Technical specification and the Technical documentation, and of the relevant standards and good practices;

**"adequate"** means corresponding to all conditions envisaged by the Contracting entity or legislation, to the specific parameters of the procurement indicated in the Technical specification and the Technical documentation, and to the relevant standards and good practices.

2.2.5. The formula for calculation of the assessment under indicator **I1** for the respective Participant is:

$EI1_n = ENG_n + SPMEL_n + CMSEP_n + STEP_n$ , where

- **ENG<sub>n</sub>** represents the number of points under sub-indicator **ENG** received by the Technical offer of the n<sup>th</sup> Participant;
- **SPMEL<sub>n</sub>** represents the number of points under sub-indicator **SPMEL** received by the Technical offer of the n<sup>th</sup> Participant;
- **CMSEP<sub>n</sub>** represents the number of points under sub-indicator **CMSEP** received by the Technical offer of the n<sup>th</sup> Participant;
- **STEP<sub>n</sub>** represents the number of points under sub-indicator **STEP** received by the Technical offer of the n<sup>th</sup> Participant.

### 2.3. Indicator "Price components" (I2)

The maximum number of points under indicator **I2** is 100 points. The relative weighting of the indicator in the complex assessment is 70 %. The assessment under indicator **I2** shall be determined on the basis of the sub-indicators in Table 3:

**Table 3**

No	Sub-indicator	Symbolic indication	Description	Number of points	Level of quality
	1.	2.	3.	4.	5.

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1.	Total price of the activities under the Public procurement for all project items	TP	The maximum number of points set out in column No 4 shall be received for the Price offer of the Participant which offered the lowest total price (in euro). The points for the Price offers of the other Participants shall be determined on the basis of a ratio to the lowest price offered in accordance with the formula in column No 5.	95	$TP_n = \frac{P_{min}}{P_n} \times 95$ , where: <ul style="list-style-type: none"> <li>• <math>P_n</math> is the total price offered by the <math>n^{th}</math> Participant;</li> <li>• <math>P_{min}</math> is the lowest total price offered by one of the Participants;</li> <li>• <b>95</b> is the maximum number of points under the sub-indicator</li> </ul>
2.	Total amount of the Price Variation Factors	PVF	The points for the Price offers shall be determined by multiplying the assessment received for the proposed price variation factors by the coefficient 0.05 in accordance with the formula in column No 5.	5	$PVF_n = VF_n \times 0.05$ , where: <ul style="list-style-type: none"> <li>• <math>VF_n</math> is the assessment of the <math>n^{th}</math> Participant relating to the proposed price variation factors determined in accordance with Table 4;</li> <li>• <b>0.05</b> is the coefficient for the calculation of the number of points under this sub-indicator.</li> </ul>

Table 4

No	Price Variation Factors	Symbolic indication	Assessment
1.	Storage and handling	SH	$VF_n = \frac{SH_{min}}{SH_n} \times 20 + \frac{Mc_{min}}{Mc_n} \times 30 + \frac{Pr_{min}}{Pr_n} \times 20 + \frac{MP_{min}}{MP_n} \times 30$ , <p>where:</p>
2.	Machinery	Mc	
3.	Profit	Pr	
4.	Project Manager hourly rate	MP1	
5.	Other Managers, Senior Engineer and Site Manager	MP2	

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	hourly rates		<ul style="list-style-type: none"> <li>• <math>MP_n</math> is the total value of the price variation factors MP1, MP2, MP3, MP4 и MP5 proposed by the <math>n^{th}</math> Participant, which is calculated as a sum of the proposed amounts for each price variation factor multiplied by the respective relative weighting: <math>MP_n = MP1_n \times 20 + MP2_n \times 20 + MP3_n \times 20 + MP4_n \times 30 + MP5_n \times 10</math>;</li> <li>• <math>MP_{min}</math> is the lowest value of the price variation factors MP1, MP2, MP3, MP4 и MP 5 proposed by one of the Participants, which is calculated as a sum of the proposed amounts for each price variation factor multiplied by the respective relative weighting: <math>MP_{min} = MP1_{min} \times 20 + MP2_{min} \times 20 + MP3_{min} \times 20 + MP4_{min} \times 30 + MP5_{min} \times 10</math>;</li> <li>• <math>SH_n, Mc_n, Pr_n, MP1_n, MP2_n, MP3_n, MP4_n</math> and <math>MP5_n</math> are the values of the price variation factors offered by the <math>n^{th}</math> Participant;</li> <li>• <math>SH_{min}, Mc_{min}, Pr_{min}, MP1_{min}, MP2_{min}, MP3_{min}, MP4_{min}</math> and <math>MP5_{min}</math> are the lowest values of the price variation factors offered by one of the Participants.</li> </ul>
6.	Engineer and Site Supervising Engineer (Civil, Mechanical, Electrical, Surveyor, QA/QC-HSE, Commercial, Planner) hourly rates	MP3	
7.	Skilled personnel (pipe layer, pipe fitter, welder, mechanic, isolator, electrical or instrument, radiographer, carpenter, steel bender, blaster rigger), Equipment Operator (Bulldozer, Dragline, Grader, Loader Excavator, Crane, Side boom, Roller, Wagon Drill, Pile driver, Road rollers) and Driver hourly rates	MP4	
8.	Labour and Helper hourly rates	MP5	

The formula for calculation of the assessment under indicator **I2** for the respective Participant is:

$EI2_n = TP_n + PVF_n$ , where

- $TP_n$  represents the number of points under sub-indicator TP received by the Price offer of the  $n^{th}$  Participant;
- $PVF_n$  represents the number of points under sub-indicator PVF received by the Price offer of the  $n^{th}$  Participant.