 Eskom	Strategy	Engineering
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Evaluation Strategy for  
Configuration Management**

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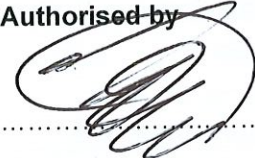
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## **1. INTRODUCTION**

Kusile Power Station is in a process to provide a structured approach on how to identify, control and maintain configuration management items/ elements throughout the operational plant life cycle. The main objective is to provide a quality configuration assurance, sustainability and alignment between physical plant asset (systems) and design base artifacts.

This service is mainly about management of configuration status account, plant items identification, plant breakdown structure management, SAP PM (Function Locations) quality management and updates, physical plant asset vs design base integration management and plant assessment and audits (operational and outages) for plant lifecycle.

This service will contribute in two ways (1). Plant Configuration Status Account and (2) Design base and SAP Status Accounting. The invite will be issued calling for interest parties to participate in the tender process for period of 5 (five) years to verify (plant walkdowns), supply, maintain, installation and audits/assessment at Kusile Power Station.

## **2. SUPPORTING CLAUSES**

### **2.1 SCOPE**

This document defines the technical tender evaluation strategy to provide services contract for configuration management services full time and some services on an as when required, which include plant Configuration Status Account and Plant Items Identification and SAP and/ or PBS database Management at Kusile Power Station. This document covers the requirements for the scope of work of the service required throughout service term level agreements.

#### **2.1.1 Purpose**

The purpose of this tender technical evaluation strategy is to define the Mandatory Evaluation Criteria, Qualitative Evaluation Criteria and TET member responsibilities for tender technical evaluation. The technical evaluation strategy serves as basis for the tender technical evaluation process.

#### **2.1.2 Applicability**

The strategy document applies to all areas of the Kusile Power Station that require the configuration management to manage, identify, control and maintain plant design and asset base requirements.

## **2.2 NORMATIVE/INFORMATIVE REFERENCES**

Parties using this document shall apply the most recent edition of the documents listed in the following paragraphs.

### **2.2.1 Normative**

- [1] 240-48929482: Tender Technical Evaluation Procedure
- [2] 240-61227631: Piping and Instrumentation Diagram
- [3] 240-71432150: Plant Labelling Standard
- [4] 240-93576498: Eskom Plant Labelling Abbreviation Standard

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- [5] 32-136: Contract Health and Safety Requirements
- [6] 32-421: Eskom Plant Life Saving
- [7] Kusile Configuration Management Plan

### 2.2.2 Informative

- [8] 240-168966153: Generation Technical Tender Evaluation Procedure.
- [9] 240-101651897: Configuration Management Strategy
- [10] ISO 10007:2017 Quality Management - Guidelines for Configuration Management

## 2.3 DEFINITIONS

### 2.3.1 Classification

**Controlled Disclosure:** Controlled Disclosure to external parties (either enforced by law, or discretionary).

## 2.4 ABBREVIATIONS

Abbreviation	Description
CM	Configuration Management
CV	Curriculum Vitae
FLOC	Function Location
PBS	Plant Breakdown Structure
P&ID	Piping and Instrumentation Diagram
SAP PM	System Application and Products Plant Maintenance
SPO	SmartPlant Operator
TET	Tender Evaluation Team

## 2.5 ROLES AND RESPONSIBILITIES

Compiler	The document compiler is responsible for ensuring that this document is up-to-date and that this document is not a duplication of an existing documentation, regarding the document's objectives and content.
Functional Responsibility	The Functional Responsible Person shall determine if the document is fit for purpose before the document is submitted for authorisation.
Authoriser	The document authoriser is a duly delegated person with the responsibility to review the document for alignment to business strategy, policy, objectives, and requirements. He/she shall authorise the release and application of the document.
Technical Evaluation Team	Provides input to the technical tender evaluation strategy and associated technical activities.

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## **2.6 PROCESS FOR MONITORING**

The primary process for monitoring will be governed by the Generation (Gx) Tender Technical Evaluation Procedure (240-168966153), this entails assuring that the service provider achieves the requirements set out in this document.

## **2.7 RELATED/SUPPORTING DOCUMENTS**

Please refer to Section 2.2

## **3. TENDER TECHNICAL EVALUATION STRATEGY**

### **3.1 TECHNICAL EVALUATION THRESHOLD**

The minimum weighted final score (threshold) required for a tender to be considered from a technical perspective is 80%.

The following factors will be considered when evaluating the tender submissions.

#### **a. TECHNICAL AREA (80%)**

##### **i. Understanding and Compliance with requirements (60%)**

The submission should address for each configuration management elements/ or and requirements plant status account, Plant design and Asset base verifications (walkdowns); Plant items Identifications (label maintenance); Plant Breakdown Structure (PBS) and SAP PM validation updates; P&ID drawings audits and analysis (redlining and including updates)

- Demonstrate a firm understanding of the requirements and goals set forth in the specification?
- Does the submission address each requirement and goal set forth in the specification?
- Does the submission provide a technical solution to indicate requirements and goals will be met.

##### **ii. Soundness of approach (20%)**

The submission must clearly indicate that the Service Provider has performed adequate planning will be available to accomplish the task as defined in the specification.

- Does the proposal include a complete plan to accomplish each requirement?
- Does the service Provider's plan demonstrate that appropriate skills and equipment will be available to carry out the task as per the requirements.
- Is the proper level of the effort directed toward each requirement?

#### **b. MANAGEMENT AREA (20%)**

##### **i. Past Performance/ Relevant Experience (15%)**

Provide evidence that the Company has perform similar type of scope in the industry. This experience must be within the last 5 years to be considered (incl. Appendix A criteria). Maximum relevant company experience in the industry performing similar scope is 10 years.

##### **ii. Reference/Recommendations (5%)**

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Letters of recommendation are required, with 2 being the minimum number of the letters from the different sources that can be considered for eligibility. These letters must be from credible, verifiable sources or companies.

### **3.2 TET MEMBERS**

**Table 1: TET Members**

<b>TET number</b>	<b>TET Member Name</b>	<b>Designation</b>
TET 1 D&S Engineering	Chuma Xayimpi	Design and Spec Manager (Acting)
TET 2 D&S Engineering	Mpho Sekonyela	Senior CM Technician
TET 3 D&S Engineering	Nonhlanhla Mtshali	Senior CM Technician
TET 4 Project Engineering	Simon Peter	Project Configuration Manager

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3.3 MANADATORY TECHNICAL EVALUATION CRITERIA

Table 2: Mandatory Technical Evaluation Criteria

N/A

3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Notes to tenderer:

Where no information provided or offered by the Tenderer no points shall be scored.

Table 3: Qualitative Technical Evaluation Scoring Criteria

SCORE	%	DEFINITION
5	100	<b>COMPLIANT</b> <ul style="list-style-type: none"> <li>Meet technical requirement(s) AND;</li> <li>No foreseen technical risk(s) in meeting technical requirements.</li> </ul>
4	80	<b>COMPLIANT WITH ASSOCIATED QUALIFICATIONS:</b> <ul style="list-style-type: none"> <li>Meet technical requirement(s) with;</li> <li>Acceptable technical risk(s) AND/OR;</li> <li>Acceptable exceptions AND/OR;</li> <li>Acceptable conditions.</li> </ul>
2	40	<b>NON-COMPLIANT:</b> <ul style="list-style-type: none"> <li>Does not meet technical requirement(s) AND/OR;</li> <li>Unacceptable technical risk(s) AND/OR;</li> <li>Unacceptable exceptions AND/OR;</li> <li>Unacceptable conditions.</li> </ul>
0	0	<b>TOTALLY DEFICIENT OR NON-RESPONSIVE</b>



Table 4: Qualitative Technical Evaluation Criteria

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
1.	<b>TECHNICAL ABILITY</b>		70	
1.1	Comprehension of Scope	<ul style="list-style-type: none"> <li>Submitted a comprehensive method statement covering all areas of scope of works with no foreseeable technical risk, and the costing covers &gt;95%</li> <li>Submitted a comprehensive method statement covering all areas of acceptable technical risk, and the costing covers 80% - 95%</li> <li>Submitted a high-level method statement covering all areas of scope of works and the costing covers 60% - 79%</li> </ul>	<p>= 5</p> <p>= 4</p> <p>= 2</p>	50

Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
		<ul style="list-style-type: none"> <li>No method statement provided and not all costs are included (Quoted &lt;60% on the list).</li> </ul>	= 0	
1.2	Execution Plan (Soundness approach)	<ul style="list-style-type: none"> <li>Submitted a full schedule with start and completion date to complete the scope. The plan is aligned to the method statement and shows proper level of effort, and it includes skills and tools required to complete the scope.</li> <li>Submitted a full schedule with start and completion date to complete the scope. The plan is aligned to the method statement and shows some level of effort, and it includes skills and tools</li> </ul>	= 5	20
			= 4	

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
		<p>required to complete the scope.</p> <ul style="list-style-type: none"> <li>Submitted a full schedule with start and completion date to complete the scope.</li> <li>No resources assigned/not aligned to the method statement.</li> <li>No schedules provided. No technical effort displayed.</li> </ul>	<p>=2</p> <p>= 0</p>	
2.	COMPANY RELATED EXPERIENCE		20	
	2.1 Company relevant experience	<p><b>Company Experience</b></p> <ul style="list-style-type: none"> <li>Above 5 years (relevant experience) = 5</li> <li>5 Years (relevant experience) = 4</li> <li>Less than 5 years = 2</li> </ul>		10
	2.1a	<b>Skill Capacity and Experience for CM</b>		5



Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
		<b>Technicians (Please reference to Appendix A):</b> <ul style="list-style-type: none"> <li>100% six Technicians provided meet all the requirements. = 5</li> <li>83% five Technicians provided meet all the requirements. = 4</li> <li>50% three Technicians provided meet all the requirements. = 2</li> <li>0% less than three technicians provided meet all the requirements. = 0</li> </ul>		
2.1b		<b>Skill Capacity and Experience for Document Controllers (Please reference to Appendix A):</b> <ul style="list-style-type: none"> <li>100% Document controllers provided meet all the requirements. = 5</li> <li>80% Document controllers provided less than 2 years = 4</li> </ul>		5

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
		<ul style="list-style-type: none"> <li>plant coding experience + 1-year SPO experience.</li> <li>40% Document controllers provided meet the minimum qualification and one of the other requirements.</li> <li>0% document controllers provided only meet the qualifications requirements.</li> </ul>	<p>= 2</p> <p>= 0</p>	
2.1c		<b>Skill Capacity and Experience for Draughting services (Please reference to Appendix A):</b> <ul style="list-style-type: none"> <li>100%: Draughtsman provided meets all the requirements.</li> <li>80%: Draughtsman provided meets the minimum qualifications and has less than 2 years relevant plus 1 year (SPO) smart plant experience.</li> <li>40%: Draughtsman provided meet the minimum qualification and one of the other requirements.</li> </ul>	<p>= 5</p> <p>= 4</p> <p>= 2</p>	5

Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Criteria Sub Weighting (%)
		<ul style="list-style-type: none"><li>0%: Draughtsman provided only meet the qualifications requirements.</li></ul>	= 0	
2.3	References for similar works	<p>List of previously completed works of similar scope with traceable references including reference letters:</p> <ul style="list-style-type: none"><li>More than 2 Letters</li><li>2 Letters</li><li>1 Letter</li><li>No letter</li></ul>	<p>= 5</p> <p>= 4</p> <p>= 2</p> <p>= 0</p>	5
			TOTAL: 100	

3.5 TET MEMBER RESPONSIBILITIES

Table 4: TET Member Responsibilities

Qualitative Criteria Number	TET 1	TET 2	TET 3	TET 4
1.1	X	X	X	X
1.2	X	X	X	X
2.1	X	X	X	X
2.2	X	X	X	X



3.6 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

3.6.1 Risks

Table 5: Acceptable Technical Risks

Risk	Description
1.	None

Table 6: Unacceptable Technical Risks

Risk	Description
1.	Deviations from the scope
2.	Exclusion of related experience to perform specified works
3.	Exclusion of proof/record of completed projects of similar scope with traceable references

3.6.2 Exceptions / Conditions

Table 7: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	N/A

Table 8: Unacceptable Technical Exceptions / Conditions

Risk	Description
1.	N/A

#### 4. AUTHORISATION

This document has been seen and accepted by:

Name	Designation	Signature
Grace Olukune	Engineering Manager	
Joseph Ngqendesha	Chief Technologist	
Mpho Sekonyela	Senior CM Technician	
Nonhlanhla Mtshali	Senior CM Technician	
Simon Peters	Project Configuration Manager	

#### 5. REVISIONS

Date	Rev.	Compiler	Remarks
November 2024	01	Chuma Xayimpi.	First Issue.

#### 6. DEVELOPMENT TEAM

The following people were involved in the development of this document:

- Chuma Xayimpi
- Mpho Sekonyela
- Nonhlanhla Mtshali

#### 7. ACKNOWLEDGEMENTS

N/A

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## 8. APPENDIX A

Nr	Criteria Description	Tender Returnable	%	Scoring Criteria
1	Configuration Management Service Requirements	<b>Six (6x) CM Technician CV with:</b> <ul style="list-style-type: none"> <li>National Diploma Certificate (Min)</li> <li>At least more than 3 years plant coding experience.</li> <li>Competency in reading plant drawings.</li> </ul>	5%	5=100% six Technicians provided meet all the requirements. 4=83% five Technicians provided meet all the requirements. 2=50% three Technicians provided meet all the requirements. 0=0% less than three technicians provided meet all the requirements.
		<b>Two (2x) Document Controllers CV with:</b> <ul style="list-style-type: none"> <li>National Diploma or Degree (Min)</li> <li>At least 2 - 3 years plant coding experience.</li> <li>1 year SPO experience</li> </ul>	5%	5=100% Document controllers provided meet all the requirements. 4=80% Document controllers provided less than 2 years plant coding experience + 1 year SPO experience. 2=40% Document controllers provided meet the minimum qualification and one of the other requirements. 0=0% document controllers provided only meet the qualifications requirements.
	Draughting Service Requirements	<b>One (1x) Senior Draughtperson:</b> <ul style="list-style-type: none"> <li>National Diploma or N3 (Min) with technical drawing or draughting certificate</li> <li>At least 2- 3 years' relevant experience</li> <li>1 year Smart Plant Drawing Packages (SPI, SPEL, SPPID, etc.) experience.</li> </ul>	5%	5=100%: Draughtsman provided meets all the requirements. 4=80%: Draughtsman provided meets the minimum qualifications and has less than 2 years relevant plus 1 year smart plant experience. 2=40%: Draughtsman provided meet the minimum qualification and one of the other requirements. 0=0%: Draughtsman provided only meet the qualifications requirements

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Nr	Criteria Description	Tender Returnable	%	Scoring Criteria
2	Plant Labelling Service Requirements	<b>Two (2x) Coding Technicians CV with:</b> <ul style="list-style-type: none"> <li>▪ National Diploma or Degree</li> <li>▪ At least more than 3 years plant coding experience.</li> <li>▪ Competency in reading plant drawings</li> </ul>	25%	<p>5=100%: all two Coding technicians provided meet the requirements.</p> <p>4=80%: one Coding technicians provided meet the requirements.</p> <p>2=40%: Coding technicians provided meet the minimum qualification requirements.</p> <p>0=0%: none Coding technicians provided meet the requirements.</p>
			<b>100%</b>	

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