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1. INTRODUCTION

Matla Power Station intends to invite Contractors/Suppliers to tender for the supply and delivery of fuel oil flow meters as specified in Scope of Work **MEC-05965**. The supplier will be required to supply and deliver the meters in accordance with the technical specifications and requirements outlined in the scope of work. The evaluation of the tender will be based on the tenderer's ability to meet the mandatory and qualitative requirements specified in Scope of Work **MEC-05965**. A weighted scorecard approach will be used to evaluate the tenders against the Employer's requirements.

2. SUPPORTING CLAUSES

2.1 SCOPE

The purpose of this document is to provide the technical evaluation strategy for Scope of Work **MEC-05965**, which covers the supply and delivery of fuel oil flow meters to Matla Power Station. This document outlines the aspects that will be evaluated and scored by the Technical Evaluation Team (TET) during the technical evaluation of the enquiry. The team members are listed and appointed in this document together with their responsibilities. The document also describes the acceptable and unacceptable risks, as well as any qualifications and/or conditions related to the evaluation.

The Technical Evaluation Strategy will define the following technical evaluation criteria:

- Mandatory Evaluation Criteria
- Qualitative Evaluation Criteria
- TET Member Responsibilities
- Acceptable / Unacceptable Qualifications

Once the Technical Evaluation Strategy is authorised no changes will be made to the evaluation criteria without appropriate authorisation.

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

This document is applicable to Matla Power Station

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] ISO 9001 Quality Management Systems
- [3] 240-12238652 Supplier Quality Management List of Tender Returnable Documents
- [4] 240-105658000 Supplier Quality Management Specification

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2.2.2 Informative

[5] Scope of Work – MEC-05965: Scope of Work for the supply and delivery of fuel oil flow meters.

2.3 DEFINITIONS

No Definitions required.

2.3.1 Classification

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

2.4 ABBREVIATIONS

Abbreviation	Description
TET	Technical Evaluation Team
EDWL	Engineering Design Work Lead
C&I	Control & Instrumentation
RFP	Request for proposal
EDWL	Engineering Design Work Lead
RFQ	Request for Quotation
SANS	South African National Standards

2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482: Tender Technical Evaluation Procedure

2.6 PROCESS FOR MONITORING

N/A

2.7 RELATED/SUPPORTING DOCUMENTS

Scope – MEC_05965: Scope of work for supply and delivery of fuel oil meters

2.8 TECHNICAL

Evaluation Threshold

All TET members as defined in the Tender Technical Evaluation Strategy (and specifically TET member responsibilities) shall independently evaluate each tender in terms of compliance to the defined Mandatory Evaluation Criteria. Each TET member shall provide an individual scoring form on the compliance / non-compliance of all tenderers' responses to the Mandatory Evaluation Criteria. Each TET member shall provide clear justification(s) for each Mandatory Criteria evaluated as non-compliant ('NO'). All individual scoring forms shall be evaluated by the EDWL to check for consistency in scoring of the Mandatory Evaluation Criteria. Should the EDWL find inconsistency in the scoring, an internal clarification meeting shall be conducted with all TET members (who performed the evaluation) in the presence of the Commercial Representative. This meeting shall aim to jointly establish which of the tenderers qualify for the next phase of Qualitative Technical Evaluation. In the case where no tenderer meets all Mandatory Evaluation Criteria this shall be formally escalated to the Commercial Representative who shall guide the

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subsequent process. All meeting minutes shall be recorded and distributed to the Commercial Representative and included in the Tender Technical Evaluation Report.

Qualitative Criteria Evaluation

Tenderers that have met all the Mandatory Evaluation Criteria shall be evaluated against the Qualitative Criteria as defined in the Tender Technical Evaluation Strategy. The scoring of qualitative criteria shall be based on the degree of achievement by the tenderer to meet the technical requirements. A score shall be allocated as per Table 2.1: Qualitative Evaluation Criteria Scoring Table, for each technical qualitative criterion. Each TET member shall populate a Tender Technical Evaluation Scoring Form for each tenderer. Note: Individual Qualitative Criteria scores shall only be finalised after all clarification sessions have been concluded.

Table 2.1: Qualitative Evaluation Criteria scoring table

Score	%	Definition
5	100	COMPLIANT ⬇ Meet technical requirement(s) AND: ⬇ No foreseen technical risk(s) in meeting technical requirements.
4	80	COMPLIANT WITH ASSOCIATED QUALIFICATIONS ⬇ Meet technical requirement(s) with: ⬇ Acceptable technical risk(s) AND/OR: ⬇ Acceptable exceptions AND/OR: ⬇ Acceptable conditions.
2	40	NON-COMPLIANT ⬇ Does not meet technical requirement(s) AND/OR: ⬇ Unacceptable technical risk(s) AND/OR: ⬇ Unacceptable exceptions AND/OR: ⬇ Unacceptable conditions.
0	0	TOTALLY DEFICIENT OR NON-RESPONSIVE ⬇ Major exceptions or conditions No technical response provided AND/OR: ⬇ Submission is irrelevant or completely non-compliant to requirement(s).
Note 1: The scoring table does not allow for scoring of 1 and 3. Note 2: Foreseen acceptable and unacceptable risk(s), exceptions and conditions shall be unambiguously defined in the relevant Tender Technical Evaluation Strategy.		

2.9 TET MEMBERS

The TET members to be appointed.

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2.10 MANDATORY TECHNICAL EVALUATION CRITERIA

Gatekeepers identified in the tender document will be “must meet” criteria identified in tabular questionnaire form. The *Contractor(s)* tender will be assessed based upon questionnaire seeking **YES** or **NO** response from the *Contractor(s)* with no point scores or weighted averaged assigned to the response.

Response of **NO** against any criteria will be elimination of the *Contractor(s)* tender for further consideration or short listing for detailed technical evaluation. Gatekeepers will be minimum criterion elements with most significant and critical parameters applicable to the successful execution of the RFP. Table 2.3 lists the mandatory gatekeeper questionnaires identified for the subject RFQ.

Table 2.2: Mandatory Technical Evaluation Criteria

	Mandatory Technical Evaluation Criteria		Meet (YES / NO)	Motivation & Comments
2.10.1	2.10.1.1	Declaration of compliance to the full scope of work	The tenderer provides a declaration letter signed by the company representative indicating compliance to the full scope of work.	The contractor must demonstrate: • Compliance with the Scope of Work. • Intent to undertake the full Scope of Work MEC-05965 • Compliance with applicable standards and specifications, where relevant. • Submission of supporting documentation confirming that the tenderer can supply the flow meters specified in the Scope of Work Compliance to standards and specifications if applicable
		Result <i>Note: A response of “NO” to any of the Mandatory Evaluation Criteria would result in a “NO”.</i>		

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2.11 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Table 2.3: Qualitative Technical Evaluation Criteria

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Score	Criteria Sub Weighting (%)
2.11.1	Control & Instrumentation Engineering		100%		
	Statement of the scope including the following:				
	2.11.1.1 Company Experience	The Tenderer is required to provide a track record of supply and delivery contracts or orders previously executed. References will only be considered if they relate to supply and delivery of flow meters similar to the item listed in Appendix A.	5+ prior supply deliveries	5	20%
			4 prior supply deliveries	4	
			1-3 prior supply deliveries	2	
			No proof submitted	0	
	2.11.1.2 Delivery Time of Equipment	Tenderer to submit a Letter or Memo from the OEM confirming the lead time for delivery of equipment listed in Appendix A.	Less or equals to 7 weeks	5	30%
			Between 7-12 weeks	4	
			More than 12 weeks	2	
			No proof submitted	0	
	2.11.1.3 Field Equipment Manufacturing Test Reports / Certificates	The tenderer shall submit current or previous OEM test reports or certificates for the flow meter specified in Appendix A, demonstrating compliance with the required model number and technical specifications.	OEM test reports/certificates submitted and demonstrate 100% compliance with the specified part number and all technical specifications, with complete, verifiable, and traceable data (e.g. calibration certificates and test results clearly linked to the supplied equipment)	5	10%

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			OEM test reports/certificates submitted and demonstrate ≥80% compliance with the required technical specifications and part number, with only non-critical information missing or not clearly traceable OEM test reports/certificates submitted but demonstrate <80% compliance OR missing one or more critical technical parameters or traceability to the required part number Non-responsive or no submission of OEM test reports/certificates	4 2 0	
2.11.1.4	Method Statement for Storage, Handling and Transportation of Instruments	The tenderer shall submit a brief method statement describing how the flow meters will be stored, handled, packaged and transported to ensure that the equipment arrives at site in good condition and in accordance with OEM recommendations. The statement must address the following topics: ▪ Packaging and protection of the flow meters during transportation ▪ Transportation conditions and precautions against mechanical damage ▪ Storage conditions prior to delivery ▪ Storeroom requirements such as protection from moisture, dust and extreme temperatures	Method statement is comprehensive and addresses all 4 required topics in detail: packaging, transportation, storage, and storeroom conditions, with clear alignment to OEM recommendations Method statement addresses at least 3 of the 4 required topics, with minor gaps or limited detail Method statement addresses only 1–2 of the required topics or lacks sufficient detail. Non-responsive or no submission	5 4 2 0	10%
2.11.1.5	Technical Documentation	The tenderer shall submit the OEM manufacturer's technical brochures and datasheets for the flow meter specified in Appendix A (Model: 80F50-RD2SAAAAA8). The submitted documentation must clearly demonstrate compliance with the model number and the technical specifications specified in the Scope of Work MEC-05965	Technical brochures/datasheets submitted and demonstrate full compliance with the specified model and all required technical parameters as defined in the Scope of Work. Technical brochures/datasheets submitted and demonstrate ≥80% compliance with the required technical specifications, with only non-critical parameters missing or not clearly defined. Technical brochures/datasheets submitted but demonstrate <80% compliance OR missing one or more critical technical parameters Non-responsive or no submission of technical brochures/datasheets.	5 4 2 0	30%

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TOTAL	100%
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2.12 TET MEMBER RESPONSIBILITIES

Table 2.4: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2	TET 3
2.10.1.1	x	x	x
Qualitative Criteria Number	TET 1	TET 2	TET 3
2.11.1.1	x	x	x
2.11.1.2	x	x	x
2.11.1.3	x	x	x
2.11.1.4	x	x	x
2.11.1.5	x	x	x

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2.13 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

2.13.1 Risks

Table 2.5: Acceptable Technical Risks

Risk	Description
1.	Method statement supplied but lacking in minor information that can be clarified or negotiated without compromising compliance.
2.	Incomplete but traceable test reports (Criterion 2.11.1.3) e.g., missing some historical certificates, but traceability and model compliance are verifiable with the OEM.

Table 2.6: Unacceptable Technical Risks

Risk	Description
1.	Non-submission of the Declaration of Compliance (Mandatory Criterion 2.10.1.1) – Tenderer fails to confirm full compliance with the Scope of Work MEC-05965
2.	Missing or irrelevant test reports / certificates (Criterion 2.11.1.3) – No proof provided that the flow meters comply with the model numbers and technical specifications specified in the Scope of Work
3.	Incomplete or missing technical documentation (Criterion 2.11.1.4) – Failure to submit manufacturer technical datasheets or supporting documentation confirming that the tenderer can supply the flow meters specified in Appendix A

2.13.2 Exceptions / Conditions

Table 2.7: Acceptable Technical Exceptions / Conditions

Risk	Description
1.	None

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Table 2.8: Unacceptable Technical Exceptions / Conditions

Risk	Description
1.	Equipment not meeting the technical specifications or model requirements specified in the Scope of Work
2.	Equipment not compliant with applicable Eskom standards or quality requirements

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7. APPENDIX A: TENDER RETURNABLES

Item No.	Material Number	Full description of Material/Spares/Equipment	Warranty (Yes/No)	Support from OEM (Yes/No)	
1	0646203	FLOW METER – Model: 80F50-RD2SAAAAAAAA8 as specified in the Scope of Work	Yes	Yes	

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