



**Technical Evaluation Strategy - Project
Management Services Air Quality Offset
Phase 2**

Generation Division

Title: **Technical Evaluation Strategy
– Project Management
Services Air Quality Offset
Phase 2**

Unique Identifier:

GX-PM000000010T

Alternative Reference Number:

N/A

Area of Applicability:

**Project
Management**

Documentation Type:

Evaluation Strategy

Revision:

2

Total Pages:

11

Next Review Date:

N/A

Disclosure Classification:

**CONTROLLED
DISCLOSURE**

Compiled by

**Ronald Mandavha
Project Manager**

Date: **6 August 2024**

Functional Responsibility

**Xolelwa Siboz
Programme Manager**

Date: **06 August 2024**

Authorised by

**Norman Mkhize
Senior Manager (Acting)**

Date: **06 August 2024**

CONTENTS

	Page
1. INTRODUCTION	3
2. SUPPORTING CLAUSES	3
2.1 SCOPE	3
2.1.1 Purpose	3
2.1.2 Applicability	3
2.2 NORMATIVE/INFORMATIVE REFERENCES	3
2.2.1 Normative	4
2.3 DEFINITIONS	4
2.3.1 Disclosure Classification	4
2.4 ABBREVIATIONS	4
2.5 ROLES AND RESPONSIBILITIES	4
2.6 PROCESS FOR MONITORING	4
2.7 RELATED/SUPPORTING DOCUMENTS	4
3. TENDER TECHNICAL EVALUATION STRATEGY	5
3.1 TECHNICAL EVALUATION THRESHOLD & METHOD	5
3.2 MANDATORY TECHNICAL EVALUATION CRITERIA	5
3.3 STAGE 2 – TECHNICAL SCORING EVALUATION	6
3.4 QUALITATIVE TECHNICAL EVALUATION CRITERIA	8
3.5 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS	10
4. REVISIONS	10
5. DEVELOPMENT TEAM	11
6. ACKNOWLEDGEMENTS	11

TABLES

Table 1: Mandatory Technical Evaluation Criteria	6
Table 2: Qualitative Evaluation Criteria Scoring Table	6
Table 3: Qualitative Technical Evaluation Criteria	8

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

1. INTRODUCTION

This document outlines the technical evaluation criteria and states how the tenderer to execute the scope of work for a **Project Management Services for the Air Quality Offset Project on an” as and when required basis or task order basis.**

2. SUPPORTING CLAUSES

2.1 SCOPE

Eskom is pursuing a multi-pronged approach to improve ambient air quality, this include reducing emissions at the existing coal-fired fleet, investing in power generation from renewables and nuclear, and implementing air quality offsets programme in and around communities close to existing coal fired power station.

Retrofitting abatement technology and diversifying the energy fleet come at higher cost and requires a longer period to implement. Air Quality Offsets Programmes on the other hand address emission sources directly within vulnerable communities, thus providing greater improvement in air quality that is experienced by community.

In addition, Air Quality Offsets Programmes are more cost effective and result in meaningful improvement of air quality within a shorter time frame.

The Contractor will be responsible for Project Management Services consisting of the following:

The development of the project management plan, logistics management, activity coordination of contractors and acquisition of sub-contractors, time management, quality management, stakeholder & communications management, resources management and risk management to accomplish stated project objectives effectively and efficiently.

The document also describes the acceptable and unacceptable risks and qualifications and/or conditions.

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 tender technical evaluation strategy serves as basis for the tender technical evaluation process.

2.1.2 Applicability

This document is applicable to the AQO Phase 2 Implementation for the Project Management Services.

2.2 NORMATIVE/INFORMATIVE REFERENCES

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

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

2.2.1 Normative

- [1] 240-48929482: Tender Technical Evaluation Procedure
- [2] 32-1034: Eskom Procurement Policy
- [3] GX-PM000000008T – Tender Technical Specification (Insulation (SPF and Ceiling Boards), and the supply of LPG (Liquid Petroleum Gas) Heaters and Hybrid stoves with Associated 9kg LPG Gas Cylinders for the Air Quality offset Project.

2.3 DEFINITIONS

Definition	Description
Tender	A tender refers to an open or closed competitive request for quotations / prices against a clearly defined scope / specification

2.3.1 Disclosure Classification

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

2.4 ABBREVIATIONS

Abbreviation	Description
PM	Project Manager
AQO	Air Quality Offsets
N/A	Not Applicable
SoW	Scope of Works
TET	Technical Evaluation Team

2.5 ROLES AND RESPONSIBILITIES

As per 240-48929482, Tender Engineering Evaluation Procedure

2.6 PROCESS FOR MONITORING

N/A

2.7 RELATED/SUPPORTING DOCUMENTS

None

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

3. TENDER TECHNICAL EVALUATION STRATEGY

3.1 TECHNICAL EVALUATION THRESHOLD & METHOD

Mandatory Technical Evaluation Criteria (gatekeepers) are 'must meet' criteria. These criteria shall not be weighted nor point scored but shall be assessed on a Yes/No basis as to whether or not the criteria are met. An assessment of 'No' against any criterion shall technically disqualify the tenderer and shall not be further evaluated against Qualitative Criteria.

Qualitative Technical Evaluation Criteria are weighted evaluation criteria used to identify the highest technically ranked tenderer after determining that all the Mandatory Evaluation Criteria have been met. The minimum weighted final score (threshold) required for a tender to be considered from a technical perspective is 70%.

A weighted score-card approach is used to evaluate the technical compliance of the tenders against the technical specifications. Tenderers need to have a weighted score of 70% overall or more to technically qualify for further evaluation.

The scoring method will be as stipulated in Table 4.

3.2 TET MEMBER

The full-time core technical evaluation team will consist of the following team members (in-line with the Tender Engineering Evaluation Procedure, 240-48929482) in Table 1:

Table 1: TET Members

TET number	TET Member Name	Designation
1	To be confirmed	Project Manager
2	To be confirmed	Project Manager

The part time/support team member shall be required to fill in a technical evaluation form, if their names are marked as mandatory (X), next to a criterion.

3.3 MANDATORY TECHNICAL EVALUATION CRITERIA

The technical evaluation process for the Project Management Services for Air Quality offset Programme will comprise of 2 stages. Stage 1 will check if the tenderers have complied with the mandatory requirements, stage 2 is a scoring tenders against the set technical evaluation criteria; If a tenderer does not submit the 2 listed mandatory requirements, will not proceed to stage 2 evaluation. The tender will be rendered to be non-responsive

Table 1: Mandatory Technical Evaluation Criteria

No	Mandatory Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
1.	Project Management Certification registered with SACPCMP/PMI as a project Manager	Valid registration certificate with relevant South African professional bodies (e.g., Project Management Institute of South Africa, South African Council for Project and Construction Management Professions).	The tenderer must have a qualified project Manager who shall be part of the proposed management team that shall manage the roll out during the contracting period. The Project Manager must have a Project Management qualification and recognised professional registration (No specific body)
2.	Project Management Certification registered with SACPCMP as a safety Officer	SACPCMP certificate as a construction health and safety officer	The tenderer must have a qualified safety office who shall be part of the proposed management team that shall manage the roll out during the contracting period. The safety officer must have a Project Management qualification and recognised professional registration (No specific body)
3.	Registration as an Electrical Contractor with Department of Employment and Labour	<i>"Certificate of registration as a Single- Phase Electrician" (IE) for a personnel</i>	One of the supervisors must be an electrician who is able to supervise and inspect electrical work in line with issuing of COC.
4.	Financial	Letter from the bank required as proof, latest 2 years Audited Financial Statements	Contractor must have a minimum of R 500,000 available to cover initial project expenses. Proof of finance is required including bank guarantees.

3.4 STAGE 2 – TECHNICAL SCORING EVALUATION

During the tender evaluations, the following Table 3 shall be used by the TET members to score each criterion:

Table 2: Qualitative Evaluation Criteria Scoring Table

SCORE	PERCENTAGE	DESCRIPTION
5	100	COMPLIANT • Meet technical requirement(s) AND;

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

		<ul style="list-style-type: none">No foreseen technical risk(s) in meeting technical requirements.
4	80	COMPLIANT WITH ASSOCIATED QUALIFICATIONS <ul style="list-style-type: none">Meet technical requirement(s) with;Acceptable technical risk(s) AND/OR;Acceptable exceptions AND/OR;Acceptable conditions.
2	40	NON-COMPLIANT <ul style="list-style-type: none">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
Note 1: The scoring table does not allow for scoring of 1 and 3		

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

3.5 QUALITATIVE TECHNICAL EVALUATION CRITERIA

Table 3: Qualitative Technical Evaluation Criteria

	Qualitative Technical Criteria Description		Reference to Technical Specification / Tender Returnable	Total Weighting (%)	Criteria Weighting (%)
				100	
1.	Rollout Strategy				
	1.1	Implement Strategy proposed & project Methodology (Formulate a project execution strategy for the Implementation of the AQO Project Management Services)	<p>Explain how you would formulate a project execution strategy (or plan) for implementation of the project and coordination of activities between contractors, households, community and take into consideration the following: Communication and stakeholder management, quality, assurance, risk management, project manpower, health & safety (include toolbox meetings recap of previous day installations, problems experienced, way forward and training)</p> <p>Not submitted: 0 Completeness (less than 80%): 2 Completeness (80% or above): 4 Complete: 5</p>		30%
	1.2	The company's experience, track record and knowledge	<p>Company reference letters for similar completed project</p> <p>Not submitted: 0 Reference letters (less than 2): 2 Reference letters (less than 4): 4 Reference letters(above 4): 5</p>		25%

	1.3	Technical Capability/ expertise and track record of the project manager assigned to the project	Detailed CV of project manager with contactable reference Not submitted : 0 Experience (less than 4 years): 2 Experience (Above 4 years and less than 8 years) : 4 Experience (Above 8 years) : 5		15%
	1.4	Technical Capability/ expertise and track record of the Safety officer assigned to the project	Detailed CV of project manager with contactable reference Not submitted : 0 Experience (less than 2 years): 2 Experience (Above 2 years and less than 4 years) : 4 Experience (Above 4 years) : 5		15%
	1.5	Technical Capability/ expertise and track record of the electrical Supervisor assigned to the project	Detailed CV of project manager with contactable reference Not submitted : 0 Experience (less than 2 years): 2 Experience (Above 2 years and less than 4 years) : 4 Experience (Above 4 years) : 5		15%

3.6 TET MEMBER RESPONSIBILITIES

Key: X = Mandatory;

Table 2: TET Member Responsibilities

Mandatory Criteria Number	TET 1	TET 2
1	X	X
2	X	X
3	X	X
4	X	X
5	X	X
Qualitative Criteria Number	TET 1	TET 2
1.1	X	X
1.2	X	X
1.3	X	X
1.4	X	X
1.5	X	X

3.7 FORESEEN ACCEPTABLE / UNACCEPTABLE QUALIFICATIONS

It is anticipated that various risks, exceptions, and conditions will be identified during the clarification and negotiation process. Each of those will be considered and evaluated individually to determine whether they are acceptable, unacceptable or whether suitable mitigation measures can be agreed upon.

4. REVISIONS

Date	Rev.	Compiler	Remarks
11 November 2022	1	Collen Chauke	1 st Issued
02 August 2024	2	Ronald Mandavha	<ul style="list-style-type: none"> Update Mandatory requirements. Updated Qualitative requirements. Added TET Members Added role and responsibility table

CONTROLLED DISCLOSURE

When downloaded from the EDMS, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorised version on the system.

5. DEVELOPMENT TEAM

The document was developed by

- Cingimiso Nkungwana
- Matimba Nxumalo
- Collen Chauke
- Ronald Mandavha

6. ACKNOWLEDGEMENTS