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| Date: …31…January…2025… | Date: 3 February 2025 | Date: 03 February 2025 |

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## TABLES

# 1. INTRODUCTION

This document outlines the technical evaluation criteria and states how the tenderer is to execute the scope of work for the provision of services for the Planning, Monitoring and Verification of the Air Quality Offset Project in Emzinoni, Thubelihle, Silobela and Refengkgotso. The work will be carried over a period of three (3) years.

# 2. SUPPORTING CLAUSES

## 2.1 SCOPE

The scope of work is for the provision of services for the Planning, Monitoring and Verification of the Air Quality Offset Project in Emzinoni, Thubelihle, Silobela and Refengkgotso. The following project activities are included in the scope of work for contractor to be appointed to undertake the PMV works.

- Activity 1: Ethical clearance (updated annually or as and when required)
- Activity 2: Area intelligence (updated annually)
- Activity 3: Household survey (before and after)
- Activity 4: Ambient Air Quality Monitoring (before and after)
- Activity 5: Emission inventory (before and after)
- Activity 6: Air quality modelling (before and after)
- Activity 7: Project effectiveness review (before and after)
- Activity 8: Database and reporting (as and when required)

Refer to the detailed scope of work (GEM22-R206)

### 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 Air Quality Offset Project in Emzinoni, Thubelihle, Silobela and Refengkgotso Township, Mpumalanga Province.

## 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] 32-1034: Eskom Procurement Policy

[3] GEM22-R206 Scope Of Work for Planning, Monitoring and Verification: Emzinoni, Thubelihle, Silobela and Refengkgotso

### 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 |
|---|---|
| AQO | Air Quality Offset |
| CoE | Center of Excellence |
| N/A | Not Applicable |
| SoW | Scope of Works |
| TET | Technical Evaluation Team |
| PMV | Planning, Monitoring and Verification |

### 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

## 3. TENDER TECHNCIAL EVALUTION 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 evaluation strategy for Safety, Health and Environmental as well as Quality is not included in this document as it does not form part of the technical scope.

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 | Motshewa Matimolane | Senior Engineer – Water CoE |
| 2 | Bryan McCourt | Middle Manager – Air CoE |

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 mandatory technical evaluation criteria is outline in Table 2 below;

**Table 2: Mandatory Technical Evaluation Criteria**

| Gatekeeper | Explanation |
|---|---|
| (1) Company's experience with Air Quality Offset Projects or related work | The bidding company must have undertaken work related the scope of this project (including but not limited to air quality offsets, air quality monitoring, dispersion modelling, development of emission inventory planning and air quality data management and reporting) in the last 5 years. One (1) signed reference letter from bidding company's client confirming work of similar scope and scale undertaken must be submitted as proof |

### 3.4 QUALITATIVE CRITERIA EVALUATION

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

**Table 3: Qualitative Evaluation Criteria Scoring Table**

| SCORE | PERCENTAGE | DESCRIPTION |
|---|---|---|
| 5 | 100 | **COMPLIANT**<br>• Meet technical requirement(s) AND;<br>• No foreseen technical risk(s) in meeting technical requirements. |
| 4 | 80 | **COMPLIANT WITH ASSOCIATED QUALIFICATIONS**<br>• Meet technical requirement(s) with;<br>• Acceptable technical risk(s) AND/OR;<br>• Acceptable exceptions AND/OR;<br>• Acceptable conditions. |
| 2 | 40 | **NON-COMPLIANT**<br>• Does not meet technical requirement(s) AND/OR;<br>• Unacceptable technical risk(s) AND/OR;<br>• Unacceptable exceptions AND/OR;<br>• Unacceptable conditions. |
| 0 | 0 | **TOTALLY DEFICIENT OR NON-RESPONSIVE** |
| **Note 1:** The scoring table does not allow for scoring of 1 and 3 | | |

### 3.5 QUALITATIVE TECHNICAL EVALUATION CRITERIA

**Table 4: Qualitative Technical Evaluation Criteria**

| CATEGORY CRITERIA | DESCRIPTION | | WEIGHT |
|---|---|---|---|
| **(1) Detailed project proposal** | A detailed project proposal & plan with intermediate and final outputs for identified activities / timeframes/ milestones. | | **25** |
| | Project proposal & plan | Indicator | Score |
| | Project proposal / plan including activities, milestones, resources, and management thereof (detailed). | 5 | 25 |
| | Project proposal / plan including activities, milestones, resources, and management thereof (basic). | 4 | 15 |
| | Project proposal / plan including activities, milestones, resources, and management thereof (with gaps). | 2 | 5 |
| | Required information not provided. Project proposal irrelevant or insufficient or inadequate | 0 | 0 |
| **(2) Methodology** | Provide detailed method statements for undertaking project activities (8 off) and a methodology of how the activities will be integrated. | | **15** |
| | Proposed method statements for project activities | Indicator | Score |
| | Proposed method statements for all activities (detailed) | 5 | 15 |
| | Proposed method statements for all activities (basic) | 4 | 8 |
| | Proposed method statements for activities (with gaps) | 2 | 5 |
| | Required information not provided. Required method statements not provided, insufficient or inadequate | 0 | 0 |
| **(3) Qualifications and experience of the <u>project manager / technical lead</u>** | The project manage / technical lead should have the relevant qualification and experience in air quality monitoring, modelling and management and related fields and must be in possession of relevant profession registration in the field. In addition, they must demonstrate proficiency in managing a project of this scope and scale. | | **20** |

| | | | |
|---|---|---|---|
| | Qualifications and experience of technical lead / project manager (provide CV's) | Indicator | Score |
| | PhD and more than 6 years' experience in the relevant field | 5 | 20 |
| | M Sc and more than 4 years' experience in the relevant field | 4 | 15 |
| | BSc or Honours degrees and more than 4 years' experience in the relevant field | 2 | 10 |
| | Required information not provided. No adequate qualifications and experience demonstrated | 0 | 0 |
| **(4) Qualifications and experience of the <u>technical support</u>** | The technical support should have the relevant qualification and experience in air quality monitoring, modelling and management and related fields and must be in possession of relevant profession registration in the field. | | **15** |
| | Qualifications and experience of technical support (provide CV's) | Indicator | Score |
| | PhD and more than 6 years' experience in the relevant field | 5 | 15 |
| | M Sc and more than 4 years' experience in the relevant field | 4 | 10 |
| | BSc or Honours degrees and more than 4 years' experience in the relevant field | 2 | 5 |
| | Required information not provided. No adequate qualifications and experience demonstrated | 0 | 0 |
| **(5) The company's experience, track record and knowledge in undertaking a similar scope** | The bidding companies are required to demonstrate relevant experience and competency in undertaking a project of similar scope and scale (i.e., ethical clearance, area intelligence, household survey, ambient air quality monitoring, emission inventory, air quality modelling, project effectiveness review, and database and reporting). | | **25** |
| | The bidding companies should submit signed references letters from previous clients where projects of a similar scope and scale were successfully completed in the previous 5 years. Provide a detailed company profile highlighting previous projects undertaken which included activities similar (in scope and scale) to the ones detailed in the scope of work of this project. | | |
| | Company experience in related scope | Indicator | |
| | 4 Positive reference letters | 5 | 25 |
| | 3 Positive reference letters | 4 | 20 |
| | 1 Positive reference letters | 2 | 15 |
| | Required information not provided. No positive reference letter provided. | 0 | 0 |

### 3.5.1 TET Member Responsibilities

Key: X = Mandatory;

**Table 5: TET Member Responsibilities**

| Mandatory Criteria Number | TET 1 | TET 2 |
|---|---|---|
| 1 | X | X |
| **Qualitative Criteria Number** | | |
| 1 | X | X |
| 2 | X | X |
| 3 | X | X |
| 4 | X | X |
| 5 | X | X |

### 3.6 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. AUTHORISATION

This document has been seen and accepted by:

| Name | Designation |
|---|---|
| Motshewa Matimolane | Senior Engineer Water CoE |
| Bryan McCourt | Middle Manager Air CoE |

## 5. REVISIONS

| Date | Rev. | Compiler | Remarks |
|---|---|---|---|
| N/A | | | |

## 6. DEVELOPMENT TEAM

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

- Motshewa Matimolane

## 7. ACKNOWLEDGEMENTS

- Bryan McCourt